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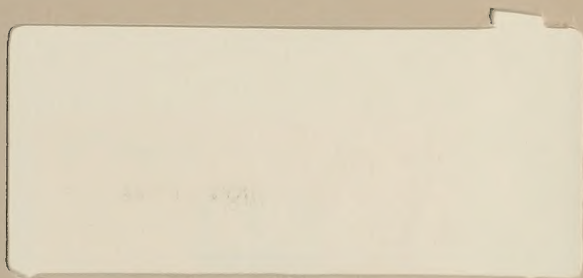
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EXECUTIVE DIRECTOR'S  
FIRST SIX MONTH REPORT  
PRESENTED TO THE  
COMMISSIONERS OF THE  
SAN FRANCISCO HOUSING AUTHORITY  
DECEMBER 14, 1989



SAN FRANCISCO  
HOUSING AUTHORITY



## INTRODUCTION

### EXECUTIVE DIRECTOR'S FIRST SIX MONTH REPORT PRESENTED TO THE COMMISSIONERS OF THE SAN FRANCISCO HOUSING AUTHORITY DECEMBER 14, 1989



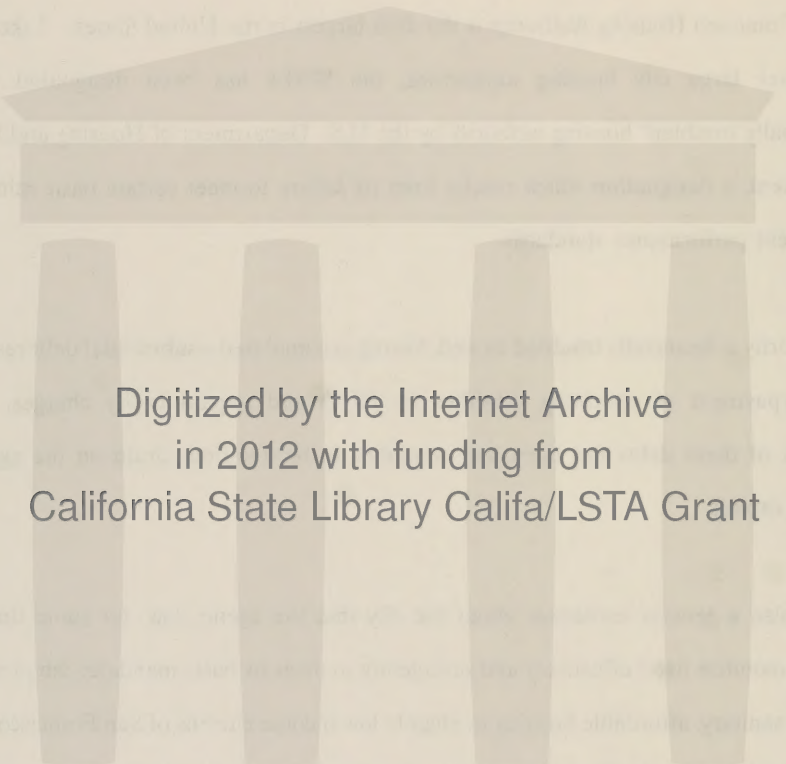


## INTRODUCTION

The San Francisco Housing Authority is the 16th largest in the United States. Like many of its sister large city housing authorities, the SFHA has been designated as an "operationally troubled" housing authority by the U.S. Department of Housing and Urban Development, a designation which results from its failure to meet certain basic minimum management performance standards.

The Authority is financially troubled as well, having accumulated a substantial debt resulting from overpayment of operating subsidies by HUD and unpaid utility charges. The repayment of these debts has been and continues to be a serious drain on the agency's operating capital.

There is also a general consensus about the city that the agency has, for some time, be unable to mobilize itself effectively and sufficiently to meet its basic mandate: the provision of decent, sanitary, affordable housing to eligible low income citizens of San Francisco. The record is replete with highly critical HUD management reviews, defensive but essentially unresponsive answers, and a variety of other forms of written testimony to the agency's incapacities. Moreover, the proliferation of vacant units at developments everywhere around the city (despite a sizeable list of eligibles waiting for housing), the rising tide of violent behavior, unchecked open drug dealing, graffiti, the proliferation of apartments which do not meet minimum standards of habitability, unanswered maintenance deficiencies,



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unrepaired broken windows, accumulation of trash, and other such conditions are visual witness to the inadequacy of the agency's management capacity. Is it so, as has been suggested by one HUD official that the agency has lost control of its developments? In some instances and at some places, perhaps. Can we prevent loss of control everywhere else and reestablish control where it may have been lost? Decidedly so, in my opinion. It will not be an easy task, and will not be accomplished in a short time period. It will take diligence, much patience, trust, and cooperation between many entities of the San Francisco community including the Commission, city administration, staff, residents, elected officials, neighborhood citizens groups, private sector business people, HUD, the State Legislature, and others, and it will not be accomplished without a clearly defined plan and time schedule.

The preservation and, where necessary the reconstruction of San Francisco's primary resource for low-income families and elderly persons is our first and highest goal and will require a broad, comprehensive approach if it is to be achieved. The San Francisco Housing Authority is not an ordinary regulatory or service bureaucracy. Instead, it is a publicly-owned enterprise engaged in the development and management of housing. Each public housing development is a community within a neighborhood setting. The fact that two developments within a stone's throw of each other can differ enormously in character and personality suggests that simple generalities about the "public housing program" will not work.

We have much about our agency and our enterprise of which to be proud. Though the process of deterioration has been slow and painful, many of our residents have not lost the



spirit to fight for change. There is a remarkable absence of despair and plenty of evidence of hopefulness. I have discovered a competence and commitment among the staff, especially at the middle management, field, and administrative levels which, frankly, I had not expected. They too, seem to be hopeful, spirited, and optimistic. The Mayor and the city administration he oversees is as committed to the preservation of public housing as any I have encountered in my career. The labor unions representing our employees have demonstrated an extraordinary foresight and willingness to work cooperatively. The Federal government represented by the HUD Region IX staff are beginning to evince a renewed confidence in us and are clearly joining forces with us to reach our goal. With a very few notable and vocal exceptions, the neighborhoods around the city which embrace our developments are supportive of their presence and want to be part of their reclamation. And, even in terms of physical condition, a number of our smaller family developments and many of our elderly developments offer stable, decent environments in which to live. These things offer much reason to be quite encouraged about our future.

But, as with any property, that stability will be lost unless there is consistent, competent attention to the delivery of basic housing management services coupled with the nurturing of the social well-being of our residents, families and elderly.

At the outset it is appropriate to acknowledge the role that inadequate funding has played in the qualitative decline of public housing in San Francisco. It is a simple fact of life that no organization can be expected to function efficiently with inadequate revenue. Public housing agencies are particularly vulnerable because of statutory and regulatory limitations on the free expansion of revenue which require such heavy reliance on operating subsidy.





It is also the fact that for most of this decade, operating subsidies and other sources of public financial support of public housing programs have been far less than adequate. Having said so, it would be all too easy to end the discussion here by simply blaming the ills of the public housing program in San Francisco on inadequate federal and state funding. To do so, however, would be disingenuous for this is a phenomenon common to all large city public housing program, and not all of our sister agencies are as troubled as we. In truth, funding inadequacies notwithstanding, this agency's performance could have been significantly better, had it adopted and implemented a number of basic management techniques and principles essential to efficient operation.

It is appropriate, then, to focus some discussion on those areas in which we appear to have lost our way for, together, though they present a number of very difficult philosophical and political choices, they comprise a blueprint for recovery.





## WHO DOES THE SAN FRANCISCO HOUSING AUTHORITY SERVE?

Perhaps the most basic issue any public housing agency must confront is the question, "is public housing in this city, housing of last resort?" The intent of the question is not to determine whether or not there are other affordable housing resources for the poor but whether or not it is the public housing authority's responsibility to house everyone who is income eligible without regard to predicted capacity to utilize the resource in a manner which preserves rather than consumes it.

The issue has significant practical impact on decisions related to management strategies. If we are housing of last resort, we admit all income eligible applicants simply in order of application date with no consideration of past histories as predictors of successful future tenancy. No one is rejected except for reasons of income. Moreover, we will construct a management organization, maintenance service capacity, security presence, and social services network of sufficient size as to respond to the increase in service demands almost always associated with occupancy by essentially unscreened residents. Because we are housing of last resort, we limit eviction to only the most extreme circumstances. And though we make every possible attempt to influence behavior of our residents and maintain a healthy living environment, we impose few, if any, sanctions. We must be prepared to absorb the costs associated with establishing such a direction and mandate because the kind of management required to respond is very expensive.



On the other hand, if we take the position that we own and manage a public resource which is not available to everyone, but mostly for those income eligible San Franciscans who can make the best use of the resource, we will adopt rigorous eligibility standards and screen applicants sufficient to predict with reasonable certainty, the likelihood of successful tenancy. Adoption of such a direction does not relieve us of responsibility to provide a full range of services to residents nor should we assume that our residents will never need assistance from us for anything other than decent housing. As such, we do advocate vigorously for services for our residents, we do organize ourselves to maintain our housing stock in compliance with minimum standards, and we set for ourselves the goal of becoming property managers in the highest tradition of public service. But as we establish minimum standards of performance for ourselves we also establish minimum standards of behavior for residents and we enforce those standards by imposing appropriate sanctions when they are not met. We advocate for the vast majority of our residents who are responsible and productive contributors to the community by protecting them from exposure to those who, by their behavior, would make victims of their neighbors.

My experience in this field has led me to conclude that there is precious little middle ground between the two positions. To the extent there is any at all, it appears that it is there that the San Francisco Housing Authority resides, yet to take a definitive position on this most fundamental of issues. Consequently, we publish eligibility criteria but apply them unevenly. We screen, but only half-heartedly. We establish admission priorities in the most horizontal manner possible so as to minimize the amount of effort required to make conscious choices and exercise responsible discretion. Once housed, we turn our new residents over to the hands of local management staff who do not have a clear





understanding of what the Authority expects of them, who are provided with inadequate resources to do an effective job, and many of whom lack the training and experience to do so, even with adequate resources. And though we publish rules and regulations governing tenancy, in the form of a lease, we enforce those rules and regulations with an unevenness and lack of conviction which results in the toleration of an extraordinary range of misbehavior. As a practical matter, the consequence is the same as though we had adopted the "housing of last resort" position, without the corresponding management system necessary to support that position.

As I have said previously, I bring with me to San Francisco a conviction that public housing is NOT housing of last resort as I have defined it here, not because I believe public housing is otherwise easier to manage (in many important ways, management is far more difficult as I perceive it) but because I believe that public housing is a precious but endangered and not self-renewing national resource which, if not preserved, will disappear forever.

Consequently, as an early step toward restoring this agency to health, it is imperative that we clearly define appropriate eligibility standards and admission priorities and that we direct agency resources to this enterprise at a level which more accurately reflects the true importance of this function.



## MANAGEMENT ISSUES

The Authority exists to fulfill one primary purpose: provision of decent housing to a specific segment of the City's population. Thus, its capacity to manage and maintain its extensive and varied stock and keep it consistently occupied is central to its purpose. Nothing is more important. And, indeed, it is in this area that the agency is weakest and where this weakness is most visible. Consider the following:

- > The vacancy rate (recently as high as 10%, now 8%) is more than twice the HUD-acceptable standard and nearly three times the citywide average, despite a waiting list of more than 2000 known eligible families and countless others not yet identified because the waiting list has been closed to new applicants for some time.
- > Though maintenance has been deferred for some time, the agency has no way of tracking its maintenance backlog, and cannot, except in the most general terms, assess the impact of having deferred most routine maintenance activities.
- > The agency has no written policies and procedures to guide it in managing its properties.
- > There are no published standards by which it evaluates its performance.





- > Service delivery is based totally on response to requests and no effort is made to assess needs and plan on the basis of the assessment.
- > The agency does not have a clear picture of the condition of its housing stock and no established priorities for the use of precious resources.
- > Though the vast majority of the agency's work is field-based, decision making is highly centralized as are a number of key service delivery functions. Maintenance personnel, for example, spend as much time behind the wheels of their vehicles or they do in the performance of their assignments.
- > The field-based workforce is undersized, inadequately structured, improperly deployed, inadequately supervised, has no clear understanding of expectations, and is inadequately informed of agency objectives and usually not involved in the development of these goals.
- > Residents have no clear understanding of the agency's capacity to provide service and thus, form expectations of their own which are usually unrealistic, and are usually disappointed. They soon become hostile, disenchanted, and many move.
- > The functional units not directly engaged in field level service delivery do not understand that they exist only to support the field operation.



- > Performance standards are not maintained. Neither good nor poor performance are appropriately sanctioned.
- > Preventive maintenance is non-existent. Consequently, the agency does not capture the benefit of the full economic life of its systems.
- > There is no mechanism for assuring quality control of the materials and supplies purchased by the agency or services it purchases.
- > The agency's organizational structure is highly linear and there has been no formal relationship between several critical inter-dependent functions.
- > Restrictive work rules inhibit maximum efficiency in the completion of many routine, uncomplicated maintenance tasks.
- > Though there may not be clear statistical evidence that the crime rate in public housing developments is significantly higher than neighborhoods around them, residents, staff, and the public at-large perceive this to be so and feel vulnerable and unsafe.
- > The agency does not analyze materials use patterns, does not anticipate materials needs, and does not adequately supply its work force. In some cases, even the basic tools of the trades are not provided.





## CONTRIBUTIONS OF THE FIRST SIX-MONTHS

While this report is primarily intended to assess major problems and recommend remedies, it is also appropriate to report the activities and accomplishments of the first six-month period which have been undertaken as initial efforts to implement the strategies discussed.

### Reduction of Vacancies

VACANCIES HAVE BEEN REDUCED FROM 600 TO 405, OR 33%  
DURING THE FIRST SIX MONTHS.

While no single indicator completely defines a housing agency's condition, its vacancy rate comes closest. On this basis, the San Francisco Housing Authority may be considered quite distressed. Beyond its usefulness as a performance indicator, the simple existence of so many vacant units in the face of an extraordinary presence of the homeless, and the wide gap in San Francisco between housing costs and ability to pay, is unconscionable. The high vacancy rate in San Francisco public housing was the single most frequently cited problem brought to my attention during my early weeks at the Authority. The Mayor and the Board of Commissioners made it quite clear that vacancy reduction must be an early and top priority of the new administration. We have committed ourselves to the effective elimination of vacancies (allowing for a normal "turnover" vacancy rate of 2%) by the end of September, 1990. In the first six months, vacancies have been reduced from 600 to 405, a net increase in occupancy of 195. Funding has been acquired to rehabilitate and reoccupy the remaining vacancies and a strategy for doing so has been developed and will



be implemented on or shortly after January 1, 1990. The charts in Appendix A shows rather dramatically that we are keeping the promise.

## Security

### **\$1.5 MILLION HAS BEEN SECURED AND EARMARKED FOR INCREASED SECURITY.**

Simply put, residents do not feel safe in their communities. Whether real or perceived, their fears make life a daily struggle and coupled with the inability to get basic maintenance services performed in a timely manner, encourages them to leave public housing for "greener pastures" even when those pastures aren't greener at all. Since the very first day of this administration we have been working with the San Francisco Police Department to establish a program of increased public safety at selected locations around the city. Though HUD does not historically fund public safety programs through its CIAP program, it agreed to include \$250,000 in funding in the original 1989 CIAP award and has now agreed to our request to add \$1.2 million in a "swap" of CDBG and CIAP funding for the coming year. This decision means, we will be well on our way to a substantially increased security effort at the SFHA. It is important to note that, even without additional funding, the SFPD has committed increased resources and manpower to the Authority over this period in a spirit of cooperation not extant in this city for some time, and far beyond my own experiences in other cities. A pilot effort involving two of our more stable developments, Holly Court and Head Street, will soon be underway which will lay the foundation for a program of shared resources between the SFHA and SFPD.



## New Financial Resources

CAPITAL FUNDING HAS INCREASED BY MORE THAN \$1 MILLION OVER THE PREVIOUS YEAR AND INCLUDES A MAJOR REDEVELOPMENT FUNDING COMMITMENT.

Restoration requires dollars as well as human resources. The agency has not earned a positive reputation for fiscal responsibility and sound management. Its relationship with its primary source of financial support (HUD) has been strained and often quite contentious. The result has been a reluctance on HUD's part to invest significant fiscal resources in this agency's future. Moreover, the agency has failed to pursue revenue sources outside of the most traditional ones and, thus, has consigned itself to struggling for survival in an environment of ever-decreasing federal resources.

In the first six months, a concerted effort has been undertaken to improve relationships with HUD, renew confidence in the agency's capacity, and re-establish a level of mutual respect. These efforts have already begun to reap rewards.

The level of funding for capital improvements in 1989-90 is up by more than \$1 million and HUD has agreed to the designation of a new Comprehensive Modernization development, virtually guaranteeing significant capital improvement funding for Sunnydale. A Memorandum of Agreement scheduling the remediation of certain management deficiencies was negotiated with relative ease, symbolizing a new spirit of cooperation between the agencies. A number of long-outstanding findings from several previous HUD management reviews have been closed as a result of responses framed and submitted during this period. The new sense of creativity which HUD has begun to apply to our various approval requests suggests that San Francisco is once again being looked upon as a worthy recipient





of HUD assistance and will, I am confident, result in more and larger awards of funding grants in the future.

### Resident Services

A PROGRAM OF CONCENTRATED MULTI-AGENCY SERVICES HAS BEEN PUT IN PLACE AT THREE DEVELOPMENTS AND AN EXPANSION PLAN HAS BEEN DEVELOPED AND FUNDED FOR THE COMING YEAR.

Under the leadership of the Authority staff, the Mayor's Office, the Deputy Mayor for Public Safety, Project SAFE, City agencies, and supporting community -based agencies, comprehensive social service programs have been available at three target locations for the past six months. Two, Alice Griffith and Plaza East were designated as target sites upon the recommendation of the Mayor's Drug Symposium Task Force. A third, Sunnydale, will be the next major comprehensive modernization development.

APPENDIX B, a report originally presented to the Commission in October 1989, contains detailed information on the types and scope of services and programs which have been organized at these sites. It is, indeed, a varied menu and is the product of the kind of inter-agency cooperation which is the true spirit of this City. But it is only the beginning.

Funding was sought and approved in our 1989 CIAP program to continue current services and expand into other areas. We have applied for an additional grant to open a safe residence for recovering drug addicted mothers with children, our first small step toward the creation of fully drug-free public housing. We will shortly undertake to develop a citywide youth sports program which will bring young people from all our developments together to compete in athletic leagues and events throughout the year. And we have



made some stunning strides in cooperation with our Unions and the San Francisco Building Trades Council, toward establishing apprentice training opportunities for our residents.

We are, first and foremost a provider of housing. But it would be folly to believe that we have a chance of succeeding at our primary mission if we fail to acknowledge that our residents have other life needs and embrace a role in advocating for them.

### Residents and Neighborhoods

DEVELOPMENT PLANNING COMMITTEES, COMPRISED OF RESIDENTS, COMMUNITY LEADERS, AND STAFF ARE BEING FORMED TO CONSIDER SHORT AND LONG RANGE PLANS FOR EACH FAMILY DEVELOPMENT.

It may be possible to achieve our objectives without resident participation but the process will take far longer and be far more difficult and painful. I prefer to work WITH the residents, not around them. We have a long way to go but, already relations are being repaired both at the local development and citywide levels. We are re-establishing a working relationship based on mutual respect, even when we do not agree. Efforts are beginning to strengthen the Public Housing Tenants Association and a number local tenant groups are growing in maturity. A specific resident hiring policy has been adopted. It is clear that resident expectations are high, that faith in the Authority is slowly being restored, and that energy for the work which lies ahead is returning.

It is also critically important that our developments cease to exist as islands of isolation surrounded by neighborhoods perceived to be unfriendly. Public housing developments and



the neighborhoods in which they reside have a greater common interest and impact on the quality of each others lives more than we think. It is essential that we take advantage of that common interest and form alliances between our residents and their neighbors. One such effort is already underway. We have begun to form Development Planning Committees composed of residents, representatives of neighborhood civic groups, the SFPD, local management, and SFHA central staff. There will eventually be a Development Planning Committee at each family development. The groups will work together to define common concerns and problems and develop recommendations for short and long term preservation and revitalization.

### Organizational Leadership

The senior staff has begun to take on a new look and a more streamlined figure. A plan for the reorganization of the Authority has been developed, submitted to the Commission, and approved. It combines four previously separate and independent divisions into two, each headed by a Deputy Executive Director.

A new Management Operations Division brings housing management and maintenance together under a single leader which aims at eventually decentralizing the maintenance function of the Authority to the various local developments where it rightfully belongs. Several key staff changes in both the management and maintenance areas have already been accomplished and a number of others are being contemplated. A new Administration and Finance Division, brings together those functions which must operate in tandem to





adequately support the field operation. Four division head positions have been eliminated and replaced by two higher level Deputies. The Deputy for Management Operations is already aboard and the process of recruiting the Deputy for Administration and Finance will conclude shortly. A new Personnel Director has been named from within the agency, and the functions of Personnel and Labor Relations have been relocated to the Executive Office. The Facilities Management Unit and its rather ambiguous functional mandate is being reshaped into the Planning and Construction Division which will assume responsibility for all capital improvement and program planning, contract and force account construction (including vacancy rehabilitation previously a responsibility of Maintenance), and major systems maintenance (elevators, heating plants, roofs, etc). Specialists in these areas will be added to our staff within the next 60 days as well as construction expert, recruited from the private sector, who will plan and oversee all capital construction projects undertaken by the Authority.

These staff changes, coupled with the general reshaping of the Authority's organizational structure and a far greater involvement of many talented staff at all levels of the agency, are already contributing to a measurable increase in the agency's competence and general morale. We are building a first-rate team to carry the Authority into the next decade.



## CONCURRENT STRATEGIES FOR THE FUTURE

It is appropriate now to look ahead, to begin assembly of the framework of a strategy for the future and to discuss some of the initial steps taken toward implementation of the strategies.

I have suggested earlier that our housing stock falls into two basic categories: stable but threatened developments (smaller family developments and most of our elderly developments) and our more seriously distressed developments (usually the larger family complexes with higher than average vacancies). Thus, there must be separate but concurrent strategies for each category, both based on the principle that the many problems to be solved will NOT be solved unless they are defined and attacked in an area no greater than the perimeter of each development.

An approach to the problem of the San Francisco Housing Authority must incorporate both a strategy for the preservation of stable developments and the reconstruction of the more distressed, decaying developments.

A strategy for preservation of existing, stable housing requires substantial improvement in the quality of the delivery of ordinary housing services. Residents must be carefully selected, rules enforced, preventive maintenance systems written and implemented, and quality maintenance delivered in a predictable and timely manner. At the San Francisco



Housing Authority, a preservation strategy must bring about substantial organizational improvement within the agency, in order to accomplish greatly improved delivery of routine housing services. This organization is simply incapable of delivering on this requirement in its current form and structure. It will be necessary to examine and reshape almost every basic service delivery system and administrative unit to achieve the magnitude of change needed.

Our first task, then, is to draw upon traditional organizational and management prescriptions to reshape the way in which the Authority conducts its business, to apply those remedies at our basically stable locations, reverse the course of deterioration, and preserve the stock of decent, stable housing for future generations.

In addition to our elderly developments around the city the following family developments are included in this category:

Holly Court  
North Beach  
Ping Yuen  
Ping Yuen North  
Alice Griffith  
San Jule  
Great Highway  
Noriega  
Trift  
Randolph & Head  
Hunters Point A  
Westside Courts  
Coleridge  
Lundy Lane

The preservation strategy will not restore our most distressed developments. For these, a more dramatic program of reconstruction will be required. In such cases, we must identify and vigorously pursue special federal funding resources such as Major Rehabilitation of Obsolete Projects (MROP), Comprehensive Modernization (CIAP), and other capital





development funding programs. Two developments, Sunnysdale and Alemany, will be reconstructed with CIAP funding and a third, Plaza West, will be completely rebuilt with a combination of federal developments funds and city funds.

Developments in this category are:

- Potrero Annex
- Potrero Terrace
- Sunnysdale
- Westbrook Apartments
- Bernal
- Valencia Gardens
- Hunters View
- Alemany
- Hayes Valley



## AN AGENDA FOR THE 1990s

If we are to accomplish our aim employing the strategies outlined above, we must develop a comprehensive agenda for change in the first half of the new decade, and a specific 5-year workplan to complete that agenda. The following, in my opinion, constitutes a comprehensive list of issues and work tasks which must be addressed:

### 1. Management Initiatives

We are not a monolithic agency and must stop behaving as though there is only one way of conducting our business. It is not accurate or smart to believe that one development is totally like another. Thus, we must be willing to explore a variety of management initiatives which are framed and applied on the basis of conditions as they exist at the specific location. Before the process of remediation is completed, we will have begun or completed activities in the following areas of management:

#### a. Resident Management

Resident management is not, as some would suggest a panacea for the solution of all our problems and it will not work everywhere. Residents must be encouraged, however, to come together in an environment which , with proper support, will test their capacity to take control of important aspects of



their own lives. It is essential that, after careful consideration, at least one resident management effort be well underway by 1995.

b. Resident Business Initiatives

The Authority must encourage and support the formation of resident-operated non-profit companies which, with tenant labor, can perform a number of essential non-management functions in service to the Authority such as groundkeeping, landscaping, household moving, cleaning services, and a number of others.

c. Private Management

We will need to establish relationships with private for-profit and non-profit management firms around the city, many of which already manage subsidized and private housing adjacent to or near our developments, to assume managerial responsibilities for selected developments of our own. It is not that I believe that it is a given that private management entities are more capable than we. Some are, in some specific areas. I firmly believe, however, that it is appropriate for this agency to constantly test its own capacity against the performance of others. Such competition is ultimately healthy and will serve the interest of our residents well.

d. Decentralization

We seem to have forgotten our true nature. We are basically a field based, 7-day per week operation which behaves like Sears. We have placed





management staff at locations around the city but have given them little authority to manage and no resources. Our maintenance service will never be truly effective until it is dispersed from its central location to as close to the places where the services are performed as possible. Front line management staff must be given the latitude to decide how and when to utilize the staff resources or they will never be fully accountable for the condition of the developments they manage. Our maintenance program which is now almost totally reactive to service requests must shift to an anticipatory mode in which deployment decisions are made in response to service needs which derive from workplans predicated upon inspection and assessment and which deliver services in accordance with established minimum performance standards.

e. Management Training

In preparation for decentralization to take place effectively it will be necessary to re-train management staff to accept and effectively employ the new authority vested in them and to make good use of the resources placed in their charge.

f. Admissions Policies and Procedures

The agency has chosen to use its latitude to establish a two-tiered system under the rules of the federal preference procedure. An applicant is determined to be either entitled to a federal preference priority (in which all possible qualifying circumstances are treated equally) or not so entitled.



Consequently, no distinctions are made between various forms of homelessness and displacement or extreme financial hardship. In addition, the agency maintains closed waiting lists for its conventional and rent-subsidy programs and, thus, has no real sense of the extent of need for affordable housing. In the foreseeable future, waiting lists will be re-opened permanently and a revised, vertical priority system will be submitted to the Commission for adoption. These measures will follow an administrative revamping of the Eligibility department procedures to streamline the application process, merge the vacancy/re-occupancy process, and eliminate subjective placement.

## 2. Resident Organization

It is vital that residents come together to form strong, cohesive organizations to work along with the Authority, not to do the Authority's work. A citywide organization of strength composed of representatives from local tenant organizations at developments across the city must be encouraged. Though it has been in existence for some time, the current citywide organization, the Public Housing Tenants Association is without significant influence because it does not gather its strength from potent local groups which, themselves, do not exist in significant numbers. The PHTA is entirely too dependent upon the Authority for too many things, a relationship which fosters weakness and undermines real partnership. Early efforts must be undertaken to assist the PHTA to become a truly representative organization by supporting its efforts to organize tenants at the local level and encouraging it to function independently by negotiating a written agreement which



requires the performance of specific services and attainment of specific objectives in return for the provision of a realistic budget which it manages itself.

### 3. "Privatization" and Resident Responsibility

We will never again be able to "do it all" when it comes to tenant services, nor should we strive to do so. Long term health of our communities will best be served by becoming partners with residents. Both partners have responsibilities. Residents living in town house arrangements should be responsible for maintenance of lawns and walkways which are theirs. Residents in flats should share responsibility for cleanliness of common areas. And to accomplish this aim, it is essential that we re-create a sense of private space at every opportunity.

At the same time, we must be prepared to offer the assistance which will be needed by many residents to fulfill those responsibilities. It is essential that residents be fully briefed on what is expected during the period of residency, what resources are available, and how expectations may be fulfilled.

The process begins with the development of orientation programs which provide all new residents with information they will need to successfully begin a tenancy and maintain it. We will be structuring this effort so that every new resident will be required to participate in an orientation session which includes general information about Authority rules, regulations, and practices as well as specific information about the community in which the resident will live. Orientation manuals will be prepared and provided.





Despite all best efforts, residents sometime encounter difficulties in meeting responsibilities even in areas of sufficient seriousness as to warrant possible eviction. Because of the devastating impact of eviction, is essential that we impose the penalty as an absolute last resort except where it results from criminal activity. We must be prepared to assist residents who fall into arrears in rent or are unable to maintain a household in acceptable condition. In the foreseeable future, we will create a training center where expert guidance in budgeting techniques, and household management skills may be taught. In addition, we will begin an effort to train residents in certain very basic maintenance techniques and skills to better enable them to meet their part of the partnership.

#### 4. Fiscal Stability

The agency's financial health is mending but will never be fully healthy unless the narrow, traditional fiscal policies it follows are abandoned. Traditional forms of revenue are highly regulated, limited in availability, and not generously offered. We are an agency which, today, derived half its revenue from very poor San Franciscans and depends for the other half on a federal government not in love with the concept of public housing. Absent a broader perspective, we are destined to be underfunded, underachievers forever. As important as establishing proper fiscal controls to assure full accountability for the appropriate use and management of the Authority's funds, is the urgent need to expand revenue sources beyond the traditional. A private enterprise which fails to do so, dies a sure death. And so might it be for us. There is no reason why we, as a responsible public agency should not borrow pages from



our private sector brothers and sisters. Long term restructure of the Authority's debt is one means of increasing revenue but it is already so late in the repayment schedule, little benefit will accrue. The debt is close to retirement, and unless further restructured, will be fully repaid by the 1991-92 fiscal year. This may be seen as an accomplishment, but this agency's lack of foresight in failing to structure some other treatment of the public portion of the debt is certainly not. The result has been a clear and dramatic reduction of services to our residents so it is they who have repaid it. Creative re-use of the prime land we own, which joins continued availability of low rent public housing with commercial land use is a far better means of stabilizing our fiscal condition. There are undoubtedly others and we must prepare to chart new directions.

We must also be ready to seek the help of the private sector through partnerships which make available the resources and skills the private sector has to offer.

#### 5. Modernization and Capital Development

Most of our developments were built between 1940 and 1969. They are now between 20 and 50 years old and have experienced an extraordinary level of wear and tear. Few have undergone significant modernization. And even the newer, mostly elderly developments were constructed without important emergency systems or were under-designed in certain critical areas, such that targeted modernization will be needed.



Though the Authority has technically complied with the requirement that it prepare and submit to HUD a Capital Improvement Plan, the plan is insufficient in many important respects and seriously underestimates our long-term capital need.

It does not adequately serve as a capital replacement program. We will therefore, within the next 9 months, undertake to develop a new capital plan which, on the basis of detailed technical inspections of every SFHA facility, will identify all capital improvement activities which will be necessary to insure 20-year viability of our entire stock and will form the basis for 5-year rolling base modernization plans. The plan will contain at least the following basic elements:

- a. a plan to bring every occupied unit up to a minimum standard of physical condition.
- b. identification of high rise buildings lacking major emergency systems and a plan to install or restore those systems to full operation.
- c. identification of those developments with outstanding emergency modernization needs and a plan to remedy those conditions.
- d. a conditions survey of every elevator (there are 53 in the system) and a plan for the overhaul and modernization of each.
- e. identification of those developments where conditions are such that major reconstruction or redevelopment is required.



6. Management of Information

Though many may think it a technical aspect of agency business not requiring much attention, an organization's ability to record, store, and analyze data relative to its activities is a critical prerequisite to its ability to account for itself. Approximately 2-1/2 years ago, with HUD CIAP support, an effort was begun to build a new, state-of-the-art MIS/EDP system. Not a single module is installed and functioning. Of all the indicators of mismanagement I have encountered during this six month period, this is the most blatant. When it became evident that resolution between the parties to the project was not likely because of the intransigent positions being taken, I engaged the services of a third party expert to evaluate the status of the project and make some recommendations. That report suggests a number of fundamental flaws in the development of the system which will need to be addressed in the short term. It is essential that this problem be resolved as it continues to be a major impediment to full remediation and ultimate monitoring and accountability of the agency's activities. It will be virtually impossible to effectively install a system of minimum performance standards, evaluate performance against those standards, and report to the public what we have accomplished.

7. Social Services/Drug Elimination/Security

Each of these areas of concern could well stand alone as an agenda item on the basis of its importance to the success of the enterprise. They are very much inter-related however. Security is a meaningless concept if not tied to the elimination of drug activity in our developments and to the remediation of social and economic conditions which lead to uncivil behavior.





Our task is not to serve in place of those agencies and organizations mandated to meet the human services needs of our residents. Rather our job is to advocate on behalf of our residents and assure the presence of a competent network of service providers of just the right kinds. Our task is not to regulate behavior or enforce criminal laws but to assure adequate presence of law enforcement agencies to first prevent criminal behavior and then to respond if and when it occurs. Our task IS to create and maintain an environment in our communities in which civil behavior and peaceful existence is the rule rather than the exception. No single course of action will get us there but the ultimate objective must be to create of our developments totally and consistently drug free zones within the city where it is clear to residents and others alike that drug activity of any kind is simply not allowed. Our residents deserve that kind of peace of mind and it is one of our foremost responsibilities to provide it to them.

8. Affirmative Action

This agency must be a leader not a follower in the establishment of affirmative action programs which actually result in apprenticeship opportunities, jobs, and economic development opportunities for minorities, community residents, neighborhood businesses, in appropriately representative numbers. We have been, it seems, satisfied to accept the rather amorphous guidelines set down by federal statutes and regulations but must now consider how to leverage the increasing availability of capital resources coming our way to the benefit of our residents and neighbors. And we must not, and cannot do so in isolation. It will be necessary to



secure the guidance and assistance of many individuals and groups which have been there ahead of us and who have clear vested interests in the outcome.

9. State Legislative Agenda

There are a few states in the Union which have enacted and funded legislation aiding in the modernization and maintenance of public housing. California is not among them.

There is a clear connection, and it is prudent for the State Legislature and the Governor to consider contributing to the health of public housing programs around the State as a preventive if not progressive measure. Within the next few months, we will host a meeting of administrators of many of the larger public housing agencies in California to begin the process of developing a legislative agenda aimed at bringing about a full partnership between the federal, state, and municipal governments.

Our agenda for the future must clearly include a host of other issues and concerns such as union-management relations, safety in the workplace, hazardous materials handling, development of a full scale communications and public information program, employee training, internal controls, administrative procedures and practices, and others.

Over the next 60-90 days I and many other SFHA staff at all levels of the organization will be looking at these issues in detail and developing an objectives/tasks based 5 year workplan for addressing all the elements of our agenda for the 1990s. It is my opinion that



the process of restoring this agency to full health and vigor will not exceed 5 years. The workplan is intended to serve as both a roadmap and a mechanism for performance evaluation, neither of which has been readily available at this agency for some time.

My final comment is one of unbridled optimism. Though my first six months here at the Authority has revealed the depth and complexity of the difficult problems we face, I have been surprised by nothing I have learned, and my confidence in our collective capacity to achieve our goal is strengthened. We can and we will succeed!









**EXECUTIVE DIRECTOR'S  
SECOND SIX MONTH REPORT**

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**THE STATE OF THE AUTHORITY  
AND  
FIVE YEAR WORK PLAN  
SEPTEMBER 5, 1990**

DOCUMENTS DEPT.

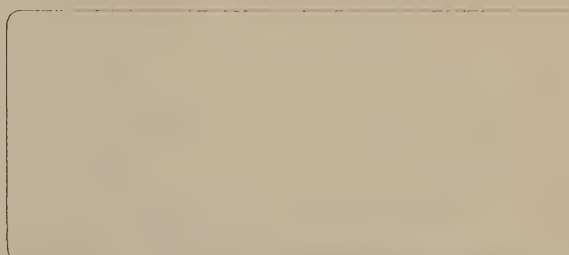
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**SAN FRANCISCO  
HOUSING AUTHORITY**

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**EXECUTIVE DIRECTOR'S  
SECOND SIX MONTH REPORT**

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**THE STATE OF THE AUTHORITY  
AND  
FIVE YEAR WORK PLAN  
SEPTEMBER 5, 1990**









# INTRODUCTION

When I arrived in San Francisco 17 months ago, we could do little more than speak of our hopes, dreams, and plans for public housing. Following a six month period of study and analysis, I reported observations, and made an assessment of the state of the Authority. Even then, while we were able to cite a few areas of progress, we still spoke mostly of our hopes and dreams for the future, though our expressions began to take on specific shapes and definitions.

Hopes and dreams are priceless commodities. They sustain during hard times, and motivate to move ahead. But we are a service agency with a large clientele whose daily lives are directly and significantly affected by how well we perform. So hopes and dreams are not enough over the long haul. Absent were two other critical components - measurable, relevant, performance standards, and specific plans that can be monitored.

Without measurable standards of performance, it is impossible to assess progress, to achieve successes, and correct failures. Without a plan, defined specifically enough to provide benchmarks and be monitored, it is never possible to know where we're headed, what can be expected of us, and when.

I am particularly pleased to present this report, not because it heralds that we have solved all our problems, but because it presents for all to see, that list of performance standards



and the workplan I believe are the two other major elements of the formula. We have moved beyond hopes and dreams into the realm of specific, measurable performance.

This is essentially a story of reclamation and preservation of public housing as a resource in San Francisco. The days of major infusion of federal dollars for the construction or rehabilitation of new public housing are long over. In the entire last decade only 4 new developments and 157 units were added to the roster, compared with 20 developments and 1330 units built or rehabilitated in the 1970s. Current indications suggest that the 1990s will be no better than the 80s. Were it not for rental assistance programs, in which this Authority participates quite heavily, there might have been no expansion of public housing at all throughout the 80s. And even these programs face an uncertain future.

Is it any wonder, then, why we have chosen our present course - the maintenance and renewal of what we have? With our waiting lists totaling more than 6900 applicants and an untold number of others eligible but not yet on the list, the preservation of rental public housing of the highest possible quality is a moral imperative.

When one further considers that we serve a current population whose average income is barely \$9500 per year, who, in the best of times must frequently chose between paying rent and feeding and clothing a family, that imperative becomes even more urgent. And, when the burdens of life in substandard, overcrowded housing at exorbitant rents experienced by most of our applicant families is added to the mix, the alternatives evaporate, and we



are left with no choice but to maintain existing public housing as one of several components of a larger affordable housing strategy in San Francisco.

There are some who would find in this report reasons to be critical because they believe we are not moving fast enough. That is a dangerous point of view for it leads us to quick, ill-conceived, and only temporary solutions.

There are others who will find in this report confirmation in their contention that public housing has failed and should be abandoned, perhaps to the highest bidder. That is the most dangerous point of view of all for it would inevitably lead to an end to racial, ethnic, and economic diversity which is a hallmark of this wonderful city, past and present.

Most, I hope, will find much comfort in this report, that we have identified our weaknesses, learned from our past mistakes, set a reasoned, responsible course, and are making real measured progress toward achievement of our goal - restoration of a much-maligned, much abused, but oh, so important public resource.

This report is submitted in two parts. We have established 12 major performance indicators which together, I believe, best describe the relative health of this agency and the public housing program in San Francisco. Together with the objectives in the workplan, they comprise a comprehensive, objective method of evaluating our performance.



In this section of the report, these indicators are defined and valuate information is presented in frank, numerically measured, and graphically illustrated terms.

Part Two represents the workplan I believe must be implemented if we are to achieve our ultimate goal. Here too, it is presented as a series of specific, time based, measurable objectives. Together, they comprise the flight plan, the instruments, and the runway lights we need to complete the journey and bring this craft to a safe landing.

There are 76 individual objectives and several hundred subtasks.

I believe the need for public housing is irrefutable, but it is impractical to believe it can survive without better management of its finances and delivery of services. Without that we cannot expect continued federal funding, interest from private business, or community support. Resident organizations must be strong, motivated, and committed to doing their part. Admission policies must be compassionate, demanding, and vigilant.

Our performance this past year is clear indication that a framework for achieving these goals is firmly in place, and review of the 5 year plan contained in part two of this report, is further evidence that we have a realistic blueprint for success.





## ASSESSING THE SECOND SIX MONTHS

1. **PERFORMANCE MEASURE:** ACHIEVE AND MAINTAIN AN ONGOING RATE OF OCCUPANCY AT 98%.

**CURRENT STATUS:** BACKLOG OF VACANT UNITS REDUCED FROM 529 A YEAR AGO TO 91 OR 98.6% OCCUPANCY AT PRESS TIME.

- > A TOTAL OF 1,564 NEW FAMILIES HOUSED.
- > REOCCUPYING VACANT UNITS PRODUCES ADDITIONAL \$1,000,000 IN ANNUALIZED REVENUE.

No single image more clearly depicts the deterioration of a housing authority development, as the sight of a vacant and vandalized unit. The broken windows, plywood and graffiti, the missing appliances, plumbing and garbage, make strong arguments for charges of neglect and mismanagement.

In addition, vacant units don't house families and they don't produce needed revenue, so for all of those reasons rehabilitating and re-occupying vacant units has been the top priority in our recovery effort for most of the past year. With nearly ten



percent of our units in such condition, the operation became our first and most visible challenge under new leadership, and our first opportunity to function in a team effort.

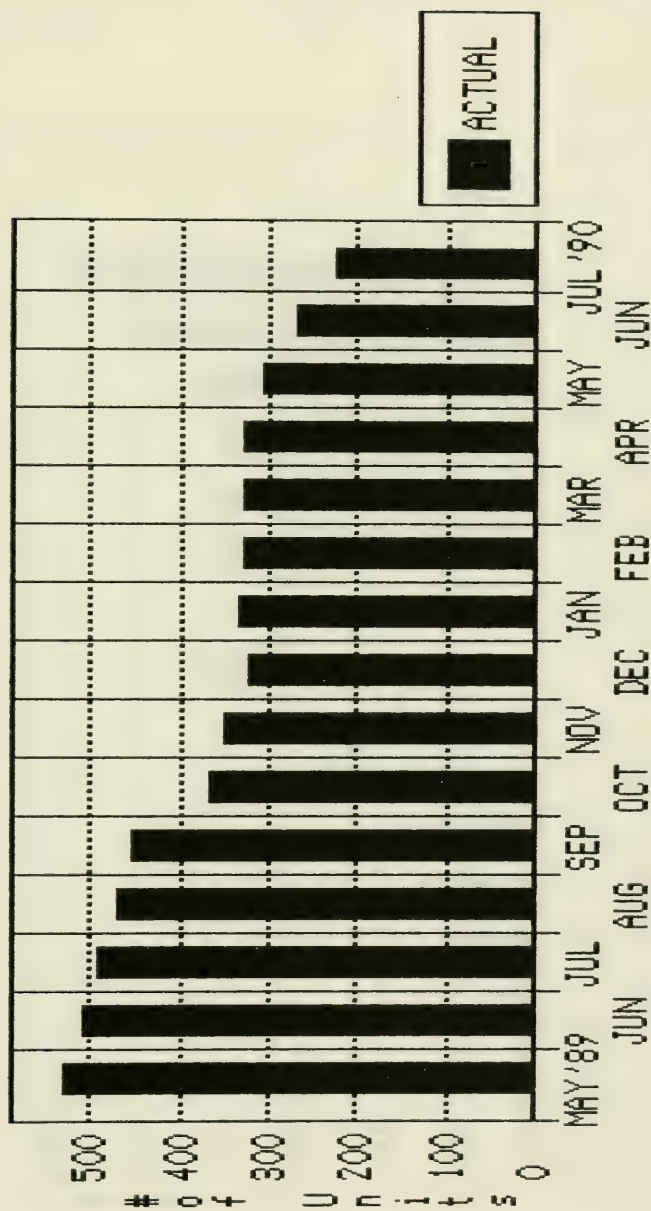
In early August we surpassed the HUD requirement of 97% occupancy, and on August 17, 1990 we reached the agency's own goal of 98%. To reclaim 365 backlogged vacant units, it was necessary to rehabilitate almost five times that many due to a move out rate of approximately 20 per week. Between May 1989 and August 1990, our maintenance crews made 1,564 units ready for occupancy.

With funds secured from HUD we were able to hire the craftsmen necessary and divide the work among two separate but equal units. One crew to work exclusively on the backlog, our regular maintenance department to keep up with the flow of vacancies from recent move outs. Each crew gave the other the breathing room necessary to accomplish their respective assignments.

Achieving 98% occupancy is especially satisfying because it seemed so impossible just 14 months ago. The bar graphs that follow illustrate the progressive decrease in backlogged vacancies and the impact on resident occupancy.

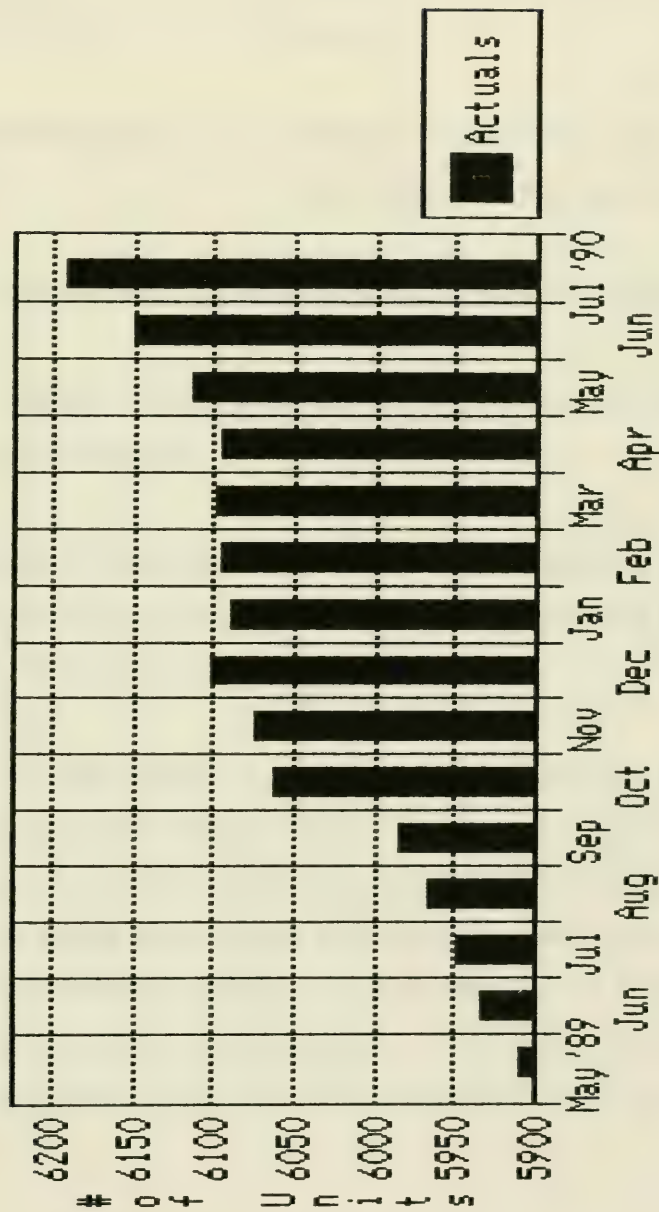


# SAN FRANCISCO HOUSING AUTHORITY VACANT UNIT ANALYSIS





# SAN FRANCISCO HOUSING AUTHORITY OCCUPANCY ANALYSIS







2. **PERFORMANCE MEASURE:** REOCCUPY NEW VACANCIES WITHIN 30 DAYS.

**CURRENT STATUS:** CURRENT VACANCIES ARE BEING REOCCUPIED IN LESS THAN 20 DAYS.

- > DELIVERY OF MAINTENANCE SERVICES IMPROVE BY 80%
- > AGENCY MOVING AWAY FROM POLICY OF DEFERRED MAINTENANCE

The stability of Housing Authority properties can be tied directly to our ability to deliver efficient, consistent, and competent maintenance services. Maintenance requests will be handled in a timely manner.

When the Force Account was established earlier this year, and assigned the responsibility of rehabilitating the backlog of vacant units, it freed the maintenance department to concentrate on work orders and new vacancies resulting from a rather high move out rate of approximately 70 per month. The results can be seen clearly in the dramatic reduction in time necessary to respond to and complete repairs. Many of these units are fire damaged and/or in need of major repairs. Even so, maintenance crews have been able to make apartments ready for occupancy on an



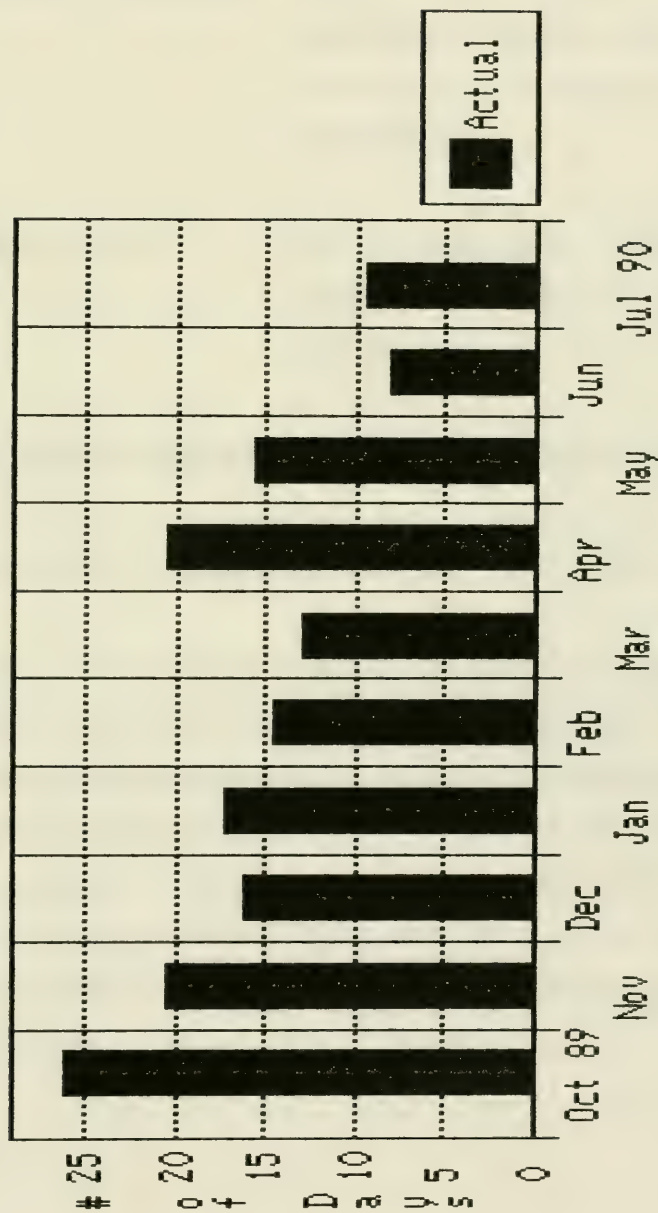
average of 15 to 20 days and in as few as eight days. This contrasts with a January, 1989 HUD finding of an average re-occupancy of 130 days.

The high move-out rate continues to be a concern, and one we feel is a primary indicator of the management and operations deficiencies we are correcting. Tenant dissatisfaction with deferred maintenance, open drug use and dealing, and lack of security have all combined to influence residents to seek housing elsewhere.

Eradicating the backlog of work orders and implementing Decentralization (discussed more fully in #3) will do much to restore tenant confidence in our ability to maintain Housing Authority properties in a condition that promotes family living. Our growing lists of Drug Treatment programs and support services, strengthened tenant organizations, and expanding police services, will all combine to lower the move out rate as our program of recovery evolves.



# SAN FRANCISCO HOUSING AUTHORITY VACANCY TURNOVER ANALYSIS





3. **PERFORMANCE MEASURE:** DELIVERY OF QUALITY ROUTINE MAINTENANCE SERVICES WITHIN 10 DAYS, IMMEDIATE RESPONSE FOR EMERGENCIES.

**CURRENT STATUS:** VASTLY IMPROVED, STILL BELOW TARGETED GOAL, BUT ON LINE WITH EXPECTATIONS.

> IMPROVED DISPATCH PROCEDURES CUT RESPONSE TIME.

> DECENTRALIZATION ON LINE FOR OCTOBER START.

Maintenance services constitute the dominant area of criticism of Housing Authority operations. Prior to formation of the Force Account Vacancy Reduction program, a severely cutback maintenance department had the multiple task of trying to control vacancies, a mountain of deferred maintenance work orders, current turnovers and current work orders. Force Account has provided maintenance with the breathing room necessary to concentrate only on current work orders and repair of new vacancies. The result is a 59% increase in work order completions over the same period last year.





A computerized system has been put in place, which tracks the status of work orders completed, issued, and cancelled, and notes the type of craft necessary. Another factor accounting for the sharp rise in completions is that jobs are being assigned in quantity, by property location. By limiting unnecessary travel, more time is utilized for the actual work. This is in effect, a mini-form of Decentralization.

## **DECENTRALIZATION:**

The Decentralization system is the cornerstone of the Housing Authority master plan for upgrading the developments. After months on the drawing board, it is now ready to be implemented and has been budgeted for an October start time at the beginning of the fiscal year.

Dispatching materials and maintenance repair services from a central location is not as effective as being dispatched from the areas where services will be executed. Too much time is lost due to travel between properties, and only results in delayed response to maintenance requests.

Maintenance Operations will now be dispersed from sites at or as close to the Developments as is economically possible. Satellite shops and warehouse areas are being set up to service selected groups of developments based on their geographical location with each other, greatly minimizing travel distance and time.



The Developments are grouped into three districts A, B, and C. District A for seniors developments only, and B, and C, for large family developments. Each district is comprised of clusters of developments called Sectors. There are four sectors.

The selection of the developments to comprise the necessary clusters, as well as the types and number of assigned craft personnel, shops and warehouses is based on the following:

- a. closest geographic location to each other.
- b. maintenance problems with very frequent occurrence.
- c. availability of facilities for offices, shops and storage areas that require minimal work to develop.
- d. approximate equal number of apartment units for each district to manage.

The overall supervision and management of each district will be the responsibility of the respective district managers. Administrative and maintenance staffing will be determined by the size and needs of each district.

The arrival of Decentralization is exciting to us because it so completely reflects the spirit of commitment embodied in the overall strategy to turn the agency around. Maintenance craftsmen will now be visible, accessible, and more responsive to our



tenants. In time we expect Decentralization to improve not only the quality of the interiors, but a noticeable improvement in the exterior appearances as well.



4. **PERFORMANCE MEASURE:** MAINTAIN FISCAL STABILITY AND APPROPRIATE OPERATING CONTROLS.

**CURRENT STATUS:** OPERATING PROCEDURES TIGHTENED, RESERVES UP, PROJECTS FUNDED.

- > SUBSTANTIAL REVENUE INCREASES FROM NEW RENTAL INCOME.
- > 1990/91 BUDGET BALANCED.
- > HUD DEBT BEING RETIRED.

The 1990-91 budget is perhaps the strongest indicator of how well the agency is conducting its business. The new budget is balanced, contains funds for initiatives begun during the past year, and provides for implementation of major new projects, most notably Decentralization. The operating reserve has increased from 20% to 30% and now meets the HUD defined minimum. The budget provides for payment of the final installment due HUD on the administrative loan extended to cover the authority's past indebtedness, and retires the debt to the Utility company.

Chief among the fund management improvements is the control of operating expenses, and the increase in operating revenue. Vacant Unit rehabilitation has





produced increases in rental income. Substantial revenues have been realized from the Leased Housing Division. The San Francisco Housing Authority Investment policy is undergoing further development and updating to maximize revenue potential. Savings have also been realized in a number of other areas, including insurance premiums, energy, and the Authority has again requested the city waive the payment of PILOT (Payment in Lieu of Taxes) this year to assist in the overall recovery.

A review of procurement, contracting, and warehousing procedures has resulted in better materials management. All staff positions have been examined. A number of them redefined, and several vacant positions frozen. Cross training and better utilization of Industry sponsored training opportunities is making it possible for more employees to achieve competency in areas separate from, but related to their primary assignments.

A new controller has been hired to implement and monitor necessary internal controls and insure sound accounting practices, and one of his major tasks will be to conduct a complete assessment of all Housing Authority land structures and stock.

This agency is still classified as "troubled", and in no way can we be considered "out of the woods," but clearly our financial operations are on an improved course. The glaring deficiencies have been corrected, most operational weak spots have been identified, and with our improved management commitment, has come a new



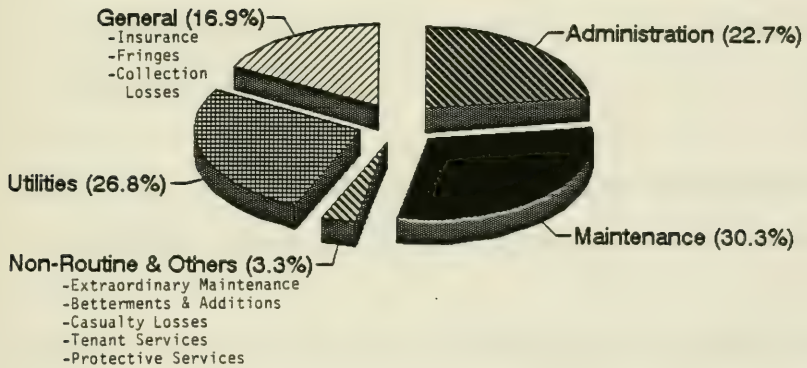
willingness by HUD to invest in the many restoration projects we have proposed. The Framework for a stable and creative fiscal management is firmly in place. Continued reorganization and refinement of the operation, will remain a top priority.

The following pie charts illustrate budgeted decreases in administrative expenditures, and increases in maintenance outlays, continuing the trend begun in the last fiscal year.

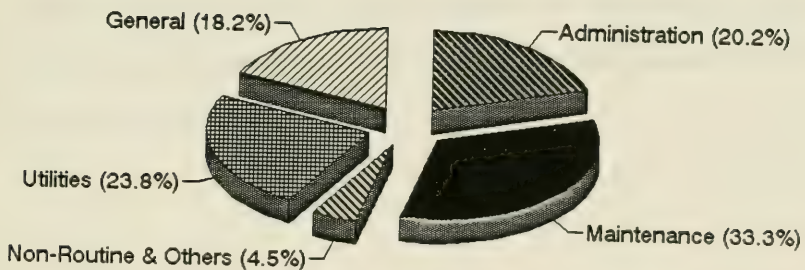


# SAN FRANCISCO HOUSING AUTHORITY OPERATING BUDGET BY MAJOR EXPENSE CATEGORIES

## FY 1989-1990



## FY 1990-1991





5. **PERFORMANCE MEASURE:** INSPECT EVERY OCCUPIED APARTMENT  
ONCE A YEAR.

**CURRENT STATUS:** STANDARDS STILL UNMET, BUT TRACK  
RECORD IMPROVED.

> HOUSING AUTHORITY INSPECTORS AVERAGING 20 INSPECTIONS  
PER MONTH.

> 74% OF ALL HOUSING AUTHORITY STOCK INSPECTED AS OF  
8/4/90 EXPECT TO REACH 100% BEFORE SEPT. 30, DEADLINE.

A maintenance service delivery program cannot hope to be truly efficient unless it anticipates needs rather than merely responds to problems. A key to quality, timely provision of maintenance is the ability of the organization to collect information on conditions and plan a strategy and schedule for remediation of deficiencies. It is not enough to wait for residents to complain. Many won't because past experience has been unsatisfactory. Others have come to accept current conditions as the standard. And those who do are often already frustrated by lack of response in the past. The result is often unreported maintenance deficiencies which go unattended until they become major problems.





The annual inspection of every apartment is actually a form of preventive maintenance. It provides a snapshot of the condition of every apartment, allows for advance planning of remedial activity, and provides an opportunity for interface between resident and manager which often results in many other benefits.

Though we moved progressively in this area, three elements still need to be defined and implemented. First, we need to develop a better standard upon which the definition of maintenance deficiencies is based. Second, there is a need to construct a more comprehensive format for the conduct of inspections including report forms, schedules, etc.. Third, the means by which the inspection results are translated into work orders which result in remediation of deficiencies must be more clearly established.

One of the objectives in the accompanying workplan addresses this issue and calls for the completion of required tasks and implementation during the coming fiscal year.



**6. PERFORMANCE MEASURE: TO ESTABLISH A PREVENTATIVE MAINTENANCE PROGRAM.**

**CURRENT STATUS:** STAFF DEVELOPING GUIDELINES AND FASHIONING A STANDARD OF QUALITY.

The value of preventive maintenance is clear. Well cared for systems last longer, fail less often, and cost less to operate. It is infinitely cheaper to maintain systems in operating condition than it is to repair it when it fails.

What has been lacking here at the Authority is a complete inventory of major systems requiring some form of preventive maintenance and a system-specific standard and schedule. The workplan contains an objective which within the coming fiscal year will result in the development and implementation of preventive maintenance of heating plants, electrical systems, plumbing system, elevators, roofs, and mechanical systems.



7. **PERFORMANCE MEASURE:** MAINTAIN COLLECTION OF RENT AT 95%.

**CURRENT STATUS:** PROCEDURES IMPROVED, BUT  
DELINQUENCIES REMAIN HIGH.

- > MORE TIMELY FOLLOW-UPS IN EARLY STAGES OF TENANT DELINQUENCY.
- > FINANCIAL COUNSELING TO HELP REDUCE RENT DELINQUENCY.
- > NUMBER OF TENANT GRIEVANCE HEARINGS INCREASED TO ASSIST IN STREAMLINING OF HOUSING AUTHORITY POLICY.

Tenant rents constitute one of the two major sources of revenue for the San Francisco Housing Authority. Approximately 50% of Housing Authority income is derived from rent, but the collection of rent continues to be one of our most frustrating problems. Most of our tenants have small fixed incomes, hard to manage on anywhere, but especially difficult in an area as expensive as San Francisco. Many have addiction problems that often compel them to neglect the more basic needs such as food, clothing, etc.

Indeed, the payment of rent is not always a top priority, and the number of delinquent cases has continued to rise despite our best efforts, which include home



visits, consultations, and legal action. We are forced to take eviction action against approximately 7 tenants a week, and currently are evicting an average of four a week.

Eviction procedures are costly, time consuming, and emotionally troubling for our staff who understandably empathize with the social and economic problems faced by many of the tenants.

The courts are more than a little empathetic too, giving greater consideration to a mother and her children, than the claims of the housing authority. The courts are often reluctant to take action that will result in a family being evicted from the only home they seem able to afford. The only difference between the courts and the authority is that they have a choice, we do not.

In attempts to bring Tenant Accounts Receivables to a level of 95%, the Housing Management Staff is establishing rent collection goals and procedures to speed up the legal process. Many of these procedures are already in effect. The legal department has increased the number of tenant grievance hearings per week and decisions made during the informal settlement hearing are immediately conveyed to the property manager in consideration of any funds that might be held in escrow.

The Department of Social Services is providing valuable assistance by establishing a system that follows up on their clients in the first month of delinquency and





provides financial counseling that often helps in the reduction of delinquencies. In addition Property Managers are being required to send tenants a letter and make home visits in addition to their present follow up during that first month of delinquency. If this process fails, immediate eviction proceeding begin.

The San Francisco Housing Authority recognizes the absolute necessity to streamline our procedures and speed up the legal process, but it's difficult to do it without some degree of duress. Many of our tenants are caught in a painful and demoralizing financial vise, that impairs their judgement, weakens their resolve, and whittles away at their options.

While the Housing Authority must collect rent to survive as an agency, we do make every effort to accomplish it humanely, with dignity, and within the bounds of compassion and common sense.



8. **PERFORMANCE MEASURE:** MAINTAIN AND UPDATE CAPITAL NEEDS PLANS FOR EACH DEVELOPMENT.

**CURRENT STATUS:** INCREASES IN CAPITAL FUNDING ALLOW MAJOR PROJECTS TO PROCEED WITH MORE OF SAME FOR NEXT YEAR.

**ROBERT B. PITTS** - After a long struggle with opposition neighborhood groups the old Yerba Buena Plaza West project was demolished, and out of the rubble -- the construction of Robert B. Pitts Development. This 203 unit townhouse complex is the first new low income family housing constructed by the San Francisco Housing Authority since the early seventies. Slated for completion in 1992, the development will provide an architectural enhancement to the Western Addition community, afford its residents optimum security, and provide ease of maintenance.

**ALEMANY**- Major modernization of this development began this year with completion expected in 1992. It will feature many of the modern conveniences necessary for family comfort such as washing machine hook ups, multiple electrical outlets in each room, new kitchens, and furnaces among others. The grounds will be re-landscaped and most units will have their own personal yard. A new community center, manager's office and central laundry facility will also be part of the restoration.



**SUNNYDALE** - One of our most distressed developments, Sunnydale is high on the list for Comprehensive Modernization. Architects were selected in a collaborative effort that included tenants, and first stage designs are scheduled for completion by late spring of next year.

**COMPREHENSIVE MODERNIZATION OF WESTBROOK APARTMENTS, HUNTERS VIEW AND BERNAL DWELLINGS** - The Authority has requested funding to begin the process of comprehensively modernizing the Westbrook Apartments, Hunters View and Bernal Dwelling developments. This allocation, which is anticipated later this year, will allow for initial architectural planning of these efforts. Residents at all three developments will be actively involved in this process.

**PLANNING FOR HAYES VALLEY, YERBA BUENA PLAZA EAST, POTRERO TERRACE/POTRERO ANNEX AND HOLLY COURTS** - The Authority has requested funding to begin joint planning efforts with the residents of the Hayes Valley, Yerba Buena Plaza East, Potrero Terrace/Potrero Annex and the Holly Courts developments to determine the appropriate long range needs of these sites. As all of these complexes have serious problems, innovative physical and management solutions will be developed, including the likelihood of eventual resident management systems at selected locations.



9. **PERFORMANCE MEASURE:** TO MAINTAIN COMPREHENSIVE  
STRUCTURE OF SUPPORT SERVICES FOR  
CHILDREN, YOUTH AND FAMILIES AT  
AUTHORITY SITES.

**CURRENT STATUS:** MULTI-AGENCY SERVICES IN TARGET  
DEVELOPMENTS BEING EXPANDED.

The Housing Authority's Resident Services program is a study in what can be accomplished when communities come together in a common effort. The coalition that includes the Authority Staff, the mayor's office, city and community based agencies, and residents, has built a structure of support services that is unique, and significant in its impact on our developments.

Last year we designed a package of support services that included child care, youth and adult employment programs, health care, and recovery programs, and put them into place at the three target sites identified by the Mayor's Drug Task Force. These sites include Alice Griffith, Plaza East, and one of our scattered sites. The programs have been used extensively by our tenants, and fulfill a vital need in Housing Authority communities. Many of these programs are now in place at two other sites, one at Valencia Gardens, and the other at the Sunnydale Development.





We have just signed an agreement with the San Francisco police department that in addition to normal police services, will now provide 21 officers on exclusive assignment to Housing Authority properties. At this reporting, meetings are in progress to determine how and where the officers will be deployed. The projected target date to begin this long awaited program is September 1.

In addition Girl Scout programs have been established at Bernal, Ping Yuen, Hunter's View, and Alemany. Boys and Girls clubs at Sunnydale, Tutorial programs at Bernal and Alemany, and a Disco Club at Valencia Gardens. Our programs help create employment opportunities, improve health services, detoxification availability, educational, and recreational activities. Social Services are also available to the developments with on-site workers.

An application for substantial funding under a federal drug elimination grant has been submitted, that will allow existing programs to continue, and new programs of Prevention and Intervention to be developed and implemented. The grant would include funding for a wide range of expanded services including resident training, development of Drug Free Communities, recovery and transitional housing.

Additional funding has been requested to implement Resident Management in at least three target sites. Holly Courts and Alemany were chosen because of their stable resident populations and relatively strong tenant organizations. The Robert B. Pitts Development was also chosen, partly because of the unique opportunities



possible in an entirely new development, but also because its resident association, though dispersed, remains very active and involved with the Western Addition neighborhood.

Our policy of resident advocacy is also a responsibility that begins here at home. A resident hiring policy was adopted by this agency last November, and since its inception, more than 36 residents have been hired, representing nearly 29% of all new employees. At the respective sites, we assist in the organizing of residents and resident councils, provide conflict resolution services, encourage and participate in community clean ups, conduct training in resident leadership, parenting and housekeeping.

Discussions are in progress with residents and unions to determine the feasibility of establishing a non-profit pest control company. Under this plan, residents would operate the company, performing work that is normally contracted out. A simple, but practical idea with strong potential.

Recreational opportunities are as necessary to our young tenants as support services are to their parents, so in January of this year we began a city-wide youth sports program which brought together young people from all our developments in a highly competitive basketball league for ages 6-15. The San Francisco Housing Authority provided uniforms and trophies, and on April 29, 1990 sponsored a benefit basketball game with the San Francisco 49ers that will become an annual event. Plans are to



develop a year round schedule of athletic activities for the youth residing in public housing.

Our first annual track meet took place this month at San Francisco State University for some 250 young people. Throughout the summer, the Authority assisted in organizing field trips to places such as Marine World, Raging Waters, and Great America.

The coalition we have established with government agencies, private business, and community agencies is healthy, productive, and enriches us all by our association in this worthy effort. That coalition includes the unions who have worked with us enthusiastically to develop apprenticeship training opportunities. Eight of our young tenants will be able to avail themselves of those opportunities in the coming fiscal year.

We will continue to actively seek new sources of funding to enhance the programs we have, and to create new opportunities. We are not able to do it all, but we are determined to do as much as possible.



10. **PERFORMANCE MEASURE:** MAINTAINS APPROPRIATE ELIGIBILITY  
AND ADMISSIONS REQUIREMENTS.

**CURRENT STATUS:** REVIEW COMPLETED, OPTIONS  
DISCUSSED, PLAN BEING FINALIZED.

- > ELIGIBILITY STANDARDS HAVE BEEN REVIEWED AND  
REWRITTEN TO ESTABLISH HIGHER STANDARDS OF TENANCY.
- > MORE THAN 300 APPLICANTS GET OFF THE WAITING LIST AND  
INTO NEWLY REHABILITATED APARTMENTS.
- > WAITING LIST SCHEDULED FOR REOPENING THIS FALL.

Throughout this first year of our recovery effort, I have repeatedly stressed that San Francisco public housing, contrary to popular perception, is not the housing of last resort. It is a resource of immeasurable value which must be preserved.

To insure availability for those who will best use the resource long into the future, I proposed we adopt more rigorous eligibility standards, initiate a meticulous screening process, establish a high standard for tenancy, and enforce that standard.





The orientation and screening processes we are developing will familiarize the applicant with the full range of services we provide, while outlining our expectations in clear terms. Eligibility will depend on the applicant's conduct in prior housing, criminal history, with serious consideration of any behavior that has resulted in destruction of property, non-payment of rent, domestic victimization, or abuse of other resident.

Put simply, there are far too many people in need of public housing, who would care for it, to continue admitting individuals who abuse it. There are approximately 4,400 families on the Section 8 waiting list, more than 2,500 on the Conventional list, and likely thousands more prepared to apply when the waiting lists are re-opened this fall, after being closed for more than two year.

Just the weekly calls regarding housing assistance range on the average from 600 to 1,000 and in the month of June alone, an average of 350 interviews were conducted by Eligibility staff. Referrals to vacant units have reached in excess of 300 per month with the accelerated completions of vacancy renovations.

Most of those applicants have families, and it is our belief that most of those families do not engage in illegal drug or criminal activities, will observe the terms of tenancy, and be appreciative of solid management.



The need for public housing is obviously greater than the available supply, making it more imperative than ever that we make them safe and desirable places to live. We are a long way from there, but every component of our recovery strategy keeps us headed in that direction.



11. **PERFORMANCE MEASURE:** THE CONTINUED DELIVERY AND EXPANSION OF SECTION 8 SERVICES.

**CURRENT STATUS:** PROGRAMS FULFILLING, IN SOME CASES EXCEEDING, EXPECTATIONS.

- > EARNINGS UP IN ALL CATEGORIES OF LEASED HOUSING.
- > SECTION 8 CERTIFICATE AND VOUCHER PROGRAMS SERVING MORE THAN 3,200 SAN FRANCISCO RESIDENTS.
- > CURRENTLY 92 UNITS IN MOD REHAB PROGRAM, AGREEMENT EXPECTED ON 129 MORE.
- > SIGNIFICANT INCREASES IN HOMELESS SUBSIDIES.

**SECTION 8 CERTIFICATE PROGRAM** - The largest and most successful of the Leased Housing programs, it currently serves more than 2600 families and earned the Authority nearly 2 million dollars in working capital last year. Under this program, families can choose private market housing in the city, within certain limitations.



**VOUCHER PROGRAM** - Currently serves 623 families, produces nearly \$350,000 in revenue, and is similar to the certificate program except that vouchers are able to be used outside of San Francisco and tenants pay more than 30% of their income towards rent. Both programs enjoy wide success, primarily because of the right to choose housing from the general marketplace.

**MODERATE REHAB PROGRAM** - Despite some degree of uncertainty about the future of contract agreements, the San Francisco Housing Authority continues to negotiate 15 year leases with landlords for rehabilitation of substandard properties. The program helps to eliminate blighted neighborhoods, and preserves rental units to be occupied solely by lower income families.

**OTHER PROGRAMS** - Annual funding continues for the relatively new McKinney Homeless Program. Under this contract, we assist homeless individuals with AIDS/ARC. The project known as the Peter Claver community has received national recognition by the House of Representatives as one of the most successful projects of the early McKinney Act. Based partly on the success, HUD has allocated 60 additional units for helping single homeless individuals who have potential for gainful employment.





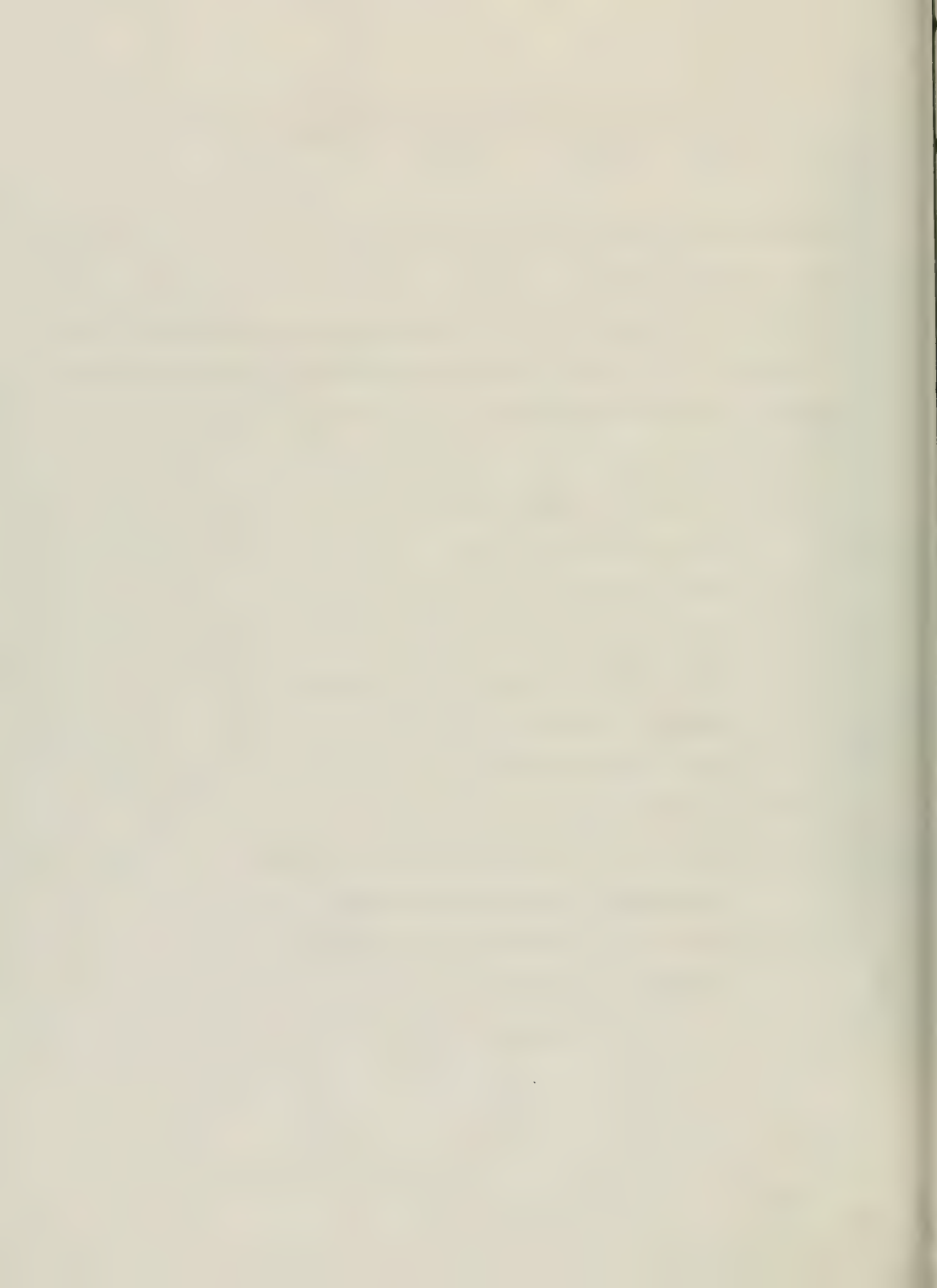




## SAN FRANCISCO PUBLIC HOUSING AN AGENDA FOR THE 1990S

In December 1989, as I concluded my first half year as the Executive Director of the San Francisco Housing Authority, I reported to the Commission my observations and conclusions as to the condition of the agency and the tasks necessary to restore it to full health and vigor. In my report, I identified eight major areas of concern which must be addressed in the process of achieving full recovery. Summarized, they are:

1. New management initiatives including
  - Resident Management
  - Resident business initiatives
  - Private management demonstrations
  - Decentralization of management and maintenance
  - Management training
  - Revision of admissions policies
2. Revitalization of resident organization
3. "Privatization" and increased resident responsibility including
  - Responsibility for maintaining common space
  - Maximization of tenant "control" over resident space
  - Implementation of orientation programs
  - Stepped up lease enforcement



4. Fiscal stability including
  - Re-establishment of traditional fiscal controls
  - Retirement of the debt
  - Enhancement of new revenue opportunities
5. Modernization and capital development including
  - Revision of the 5 year capital plan
  - System-wide code compliance
  - Completion of development master plans
6. Modernization of the MIS/EDP system
7. Social services and security program development
8. Affirmative Action including
  - Apprenticeships
  - Job opportunities
  - Resident economic development
9. Creation of a State legislative agenda.

Earlier this year, a group of approximately 55 Authority staff representing all areas and levels of the agency's operation gathered for several days of discussion, review, analysis and planning. Out of this process comes this detailed workout plan which identifies objectives, tasks, and time schedules associated with the remediation of problems which together define the reasons for the less-than-good health we continue to experience.



Though the plan extends for a full 5 year period, it will soon become evident that most of the tasks identified are scheduled for completion within the first 3 years of the plan.

Objectives, tasks and time schedules are grouped by major functions including:

- Management
- Maintenance
- Resident services
- Capital planning and renewal
- Administrative services
- Financial management
- Legal services.

Following a narrative introduction to each section, each major objective is presented separately on a form which lists all tasks necessary to be accomplished in meeting the objective. Additionally, a project completion date for each task defined in quarter years through the 5 year period is also included.

Each year of the five-year plan corresponds to a fiscal year of the Authority which begins on October 1 and ends on the following September 30. Each fiscal year is further divided into quarter years and performance measurement dates are intended to be read as the end of each respective quarter. The performance period of this plan actually commenced with the current fiscal year which began on October 1, 1989. Consequently, year 1, quarter 1 begins October 1, 1989 and ends December 31, 1989. Year 1, quarter 2 begins January 1,





1990 and ends March 31, 1990, and so on through the period.

In my first report, I mentioned that the competence and commitment of our staff at the Authority should be viewed as a source of pride. This report illustrates the truth of that statement. It would not have been possible to construct a workout plan as comprehensive and detailed as this without the involvement of the staff. They approached the task of building the plan seriously, thoughtfully and openly. My confidence in our ability to carry out the plan on schedule is predicated in large measure on my belief that half the battle, the assembling of a capable dedicated staff, has already been won.



## MANAGEMENT AND MAINTENANCE

Management, together with maintenance of the physical plant, is the backbone of the agency's mandate. The means by which we manage our diverse and disparate enterprise and the quality with which we manage it is the cutting edge which, more than any other function, determines the relative level of success of the public housing program in San Francisco. The Authority manages an extensive field operation and it is at the level of each development that the primary relationship between the residents and the Authority is defined. Consequently, it is only logical that primary emphasis be placed on the quality of services delivered at the field level. It also stands to reason that the field operation, maintenance and management services, be deployed from locations as close to the work sites as possible.

At the same time, if improvement of the environmental quality at the development level is to be achieved, change is required as well, at the point in the process when new applicants are screened and admissions decisions are made. It is essential, as well, to remember that the means by which this Authority provides affordable housing to low income San Franciscans is no longer singularly defined by the various developments it owns and manages. A significant number, more than 4000, of our City's poor families are housed through public/private cooperation under the federal Section 8 and Housing Voucher programs.



Objectives, tasks and time schedules in this section will embrace a range of functional issues related to:

- Eligibility/admissions including
  - Revision of federal preference policy
  - Revision of eligibility standards
  - Screening methodology
  - Role of current residents in screening
  - Permanent re-opening of waiting lists
- Conventional development management including
  - Revised assignment and deployment
  - Training
  - Improved rent collection
  - Annual inspections
  - Establishment of development assessment programs
  - Redefinition of resident responsibilities
  - Proceed with resident management demonstrations
- Maintenance including
  - Decentralization of regular maintenance program
  - Preventive maintenance procedures
  - Vacancy turnaround production
  - Physical systems inspection programs
- Leased Housing Programs including
  - Improved certificate holder assistance



- Coordination with eligibility
- Affirmative marketing
- Improved inspections
- Internal program controls and performance monitoring.





GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
1. OBJECTIVES/TASKS/SUBTASKS	Review, enhance and implement admissions criteria application process to ensure effective screening measures.																				
T1	Establish criteria to determine acceptable or unacceptable criminal behavior.				X																
	ST1 Solicit input from DSS, Mayor's Office, SFPD, Legal Counsel.				X																
T2	Review criminal record and deny admissions to applicants with less than four years of clean behavior.				X																
T3	Hire two eligibility technicians to conduct home visits for Public Housing applicants.								X												
	ST1 Draft job descriptions				X																
	ST2 Review budget constraints				X																
	ST3 Advertise for staff								X												
T4	Implement Tenant Networking servicing to verify applicant's rent paying habits and past credit.								X												
	ST1 Review budget constraints				X																
	ST2 Meet with District Managers to discuss role of the Property Managers								X												
T5	Provide interview techniques workshop for staff.				X																



GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
2. OBJECTIVES/TASKS/SUBTASKS prioritized needs of applicant.																					
T1	Review federal preferences and solicit pros and cons of current system.				X																
T2	Rewrite federal preferences expanding the category of involuntary displacement to four additional categories of descending order.				X																
	ST1 Submit to Executive Director for review.				X																
	ST2 Submit resolution to Commission for adoption.				X																
	ST3 Resequence the waiting list.				X																



GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:	3. OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	T1 Conduct yearly update	X					X			X											X
	ST1 Review budget for purchase of scanner to expedite procedure	X																			
	ST2 Purchase scanner						X														
	T2 Maintain an open registration				X																
	ST1 Inform, advertise and market program to the public	X																			
	ST2 Set-up phone system	X																			
	ST3 Train staff	X																			
	ST4 Register applicants				X																
	T3 Order metal filing cabinets to store an additional 15,000 files				X																
	ST1 Review budget	X																			
	ST2 Submit resolution to the Commission for purchase				X																



GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the  
 Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
4.	OBJECTIVES/TASKS/SUBTASKS	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1	Review and edit existing manual																				
	ST1 Incorporate changes to federal preferences		X																		
	ST2 Incorporate changes to transfer policy			X																	
	ST3 Incorporate HUD specifications for HUD compliance in regards to M.O.A., i.e., eliminate broad range of income and locational preferences			X																	
T2	Submit Occupancy Policy to Executive Director for review				X																
	ST1 Incorporate his recommendations				X																
T3	ST2 Draft resolution for Commission's meeting				X																
	Submit Occupancy Policy resolution to Commission's meeting				X																





GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
5. OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1	Solicit input from staff i.e., critical offices, maintenance and eligibility regarding pros and cons of current system.		X																		
T2	Meet with MIS Manager to place locus of control with Eligibility regarding the release of available units		X																		
	ST1 Train staff		X																		
T3	Multi-cover all vacant and available units												ON -GOING								X
T4	Eliminate applicants choice of three referrals							X													
	ST1 Solicit approval from Executive Director							X													
	ST2 Amend Occupancy Policy							X													



GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
6.	Provide front-line information to the public and staff regarding programs and basic eligibility.																				
T1	Work with Director of Communications to publish current brochures regarding the Section 8 and Public Housing Programs.																				
T2	Develop a slide show for Public Housing Briefing Session.																				
T3	Disseminate information within 24 hours i.e., memos, S.S.No. and AFDC documents.																				
ST1	Solicit input from DSS and Social Security Administration.																				



GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
7. OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1	Translate current materials into Vietnamese, Russian, Spanish and Chinese.																				
T2	Purchase a TDD machine for the hearing impaired.																				
T3	Provide training to staff regarding multi-cultural issues.																				
T4	Consult with Resident Services Director.																				



GOAL: To determine eligibility for low to moderate income families for federal housing assistance for the Section 8 and Conventional Housing Programs.

DIVISION/DEPT:		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
8. OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1 Maximize services to clients by upgrading technology and office work space.																					
T1 Submit requests for CIAP funding.																					
ST1 Purchase typewriters																					
ST2 Purchase scanner for updating waiting list																					
ST3 Re-hab Eligibility Office to accommodate additional staff files and equipment																					
ST4 Translate publications into Vietnamese, Chinese, Spanish and Russian																					
ST5 Hire two eligibilty technicians																					





DIVISION/DEPT: Section 8 Division/Leased Housing	OBJECTIVES/TASKS/SUBTASKS Marketing Plan to recruit owners of rental units from all neighborhoods in the city.	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1	Identify key groups in the Real Estate Community.	X																			
T2	Send letters of introduction requesting information on membership and requesting to be placed on the mailing list.	X																			
	STA. Attend monthly meetings and/or luncheons.	X																			
	STB. Run ads about Section 8 in their publications.	X																			
	STC. Write articles for their newsletter or monthly publications.								X												
T3	Develop a Section 8 Fact Sheet.	X																			
T4	Develop a Section 8 Quarterly information Newsletter.																				



DIVISION/DEPT: Section 8 Division/Leased Housing		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Develop certificate holder assistance strategies to increase tenants success rate in finding a rental unit.																					
T1	<u>Establish closer ties with Eligibility unit to assist in briefing process.</u>																				
	STA. Create advisory committee comprised of members from Eligibility and Section 8 departments.	X																			
	STB. Committee submits report on recommendations.	X																			
	STC. Conduct necessary staff training.	X																			
	STD. Implement committee recommendations.	X																			
T2	<u>update Section 8 Tenants Guide Handbook.</u>														X						
T3	<u>Update Property Owner's Guide Handbook.</u>														X						
T4	<u>Obtain visual aids to assist in explaining programs.</u>														X						



DIVISION/DEPT: Section 8 Division/Leased Housing		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Establish program monitoring controls to ensure compliance with HUD annual recertification and unit inspections requirements.																					
T1	Conduct audit's on 10% of annual unit inspections and tenant recertifications.																				
STA.	Develop procedure for random selection of audit reviews for all inspectors and recertifications.																				
STB.	Develop log books for each function.																				
STC.	Develop format for reporting results of audit to Division Director.																				
STD.	Develop method of providing feed back to staff on performance.																				
STE.	Implement field audit and file review program.																				
T2	Develop file checklist of required annual case activity.																				



DIVISION/DEPT: Section 8 Division/Leased Housing		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
Develop drug prevention component to monitor and eliminate illegal drug activity in Section 8 Subsidized rental units.		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1 <u>Establish drug prevention committee.</u>		PENDING PUBLICATION OF FINAL HUD REGULATIONS.																			
STA.	Committee reports on requirements of Federal regulations.																				
STB.	Committee submits report on staffing needs and operating procedures required to implement Federal drug prevention regulations.																				
T2	<u>Hire necessary staff.</u>																				
T3	<u>Conduct staff training.</u>																				
T4	<u>Implement drug prevention program.</u>																				





DIVISION/DEPT: Section 8 Division/Leased Housing		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
T1	Develop a summary of HQS for landlords.																				
STA.	Create advising committee on HQS comprised of Housing Inspectors.	X																			
STB.	Committee submits report on recommendations.		X																		
STC.	Prepare HQS summary and implement committee recommendations.			X																	
T2	Develop format for landlord seminars.																				
STA.	Create advisory committee on L/L seminar.	X																			
STB.	Committee submits report on recommendations.		X																		
STC.	Implement committee recommendations.			X																	



DIVISION/DEPT: Section 8 Division/Leased Housing												
	YEAR 1				YEAR 2				YEAR 3			
	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS Prepare unit standard to guide inspector and establish uniformity in inspections and rent determinations.												
T1 <u>Develop uniform standards.</u>												
STA. Create unit standards committee.	X											
STB. Committee submits report on recommendations.		X										
STC. Implement committee recommendations.				X								



DIVISION/DEPT: Section 8 Division/Leased Housing		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Increase the overall assistance portfolio to offer subsidy assistance to more city residents.																					
T1	<u>Review on a regular basis all HUD NOFA's.</u>	X																			
T2	<u>Make regular contacts with HUD about new programs.</u>	X																			



DIVISION/DEPT: Section 8 Division/Leased Housing

OBJECTIVES/TASKS/SUBTASKS  
Implement a Plan to conduct a regular Market Rent Survey.

YEAR 1 YEAR 2 YEAR 3 YEAR 4 YEAR 5

1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4

T1 Establish a comparable listing of rental units in San Francisco.

STA. Create a working team to conduct telephone surveys on Market rent in all neighborhoods.

STB. Compile information and type on 3x5 index cards by bedroom size and neighborhood.

STC. Implement Plan.

T2 Hire the services of a private agency to provide updated survey on a regular basis.

X

X

X

ON GOING





DIVISION/DEPT: CONVENTIONAL HOUSING MANAGEMENT		YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
OBJECTIVES/TASKS/SURTASKS		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
Improve Employee & Tenant Moral by Implementing Education, Training and Incentive Programs																										
TASKS:																										
1. Expand Opportunities for Staff Educational Programs with Agency reimbursement for tuition/expenses		X																								
2. Provide specific Remedial Training Programs for Staff on an annual basis						X																				
3. Develop an Orientation Program for new employees						X																				
4. Provide a Training Program for Tenant Association Members and leaders to help them develop leadership and organizational skills										X																
5. Sponsor Recognition Event and award for "Tenant of the Year", "Employee of the Year", "Project Development of the Year", etc., with specific criteria established for each award										X																
6. Expand the opportunity for advancement of employees in the Authority with a "Career Ladder" approach																X										







DIVISION/DEPT: CONVENTIONAL HOUSING MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASKS:																					
1. Increase rent collection to 95%					X																
2. Increase rent collection to 97%									X												
3. Increase rent collection to 99%													X								
SUB TASKS:																					
1. Train and monitor Managers to ensure consistent application of Rent Collection policy									X												
2. Monitor Managers to determine ongoing status of delinquency					X																
3. Refer tenants to appropriate community agencies and increase participation in non-recurring payment programs													X								
4. Training of Staff together with Legal Staff on preparation of legal packets																	X				
5. Timely preparation of tenant files for legal action within two (2) months of arrearage																					
6. Request and monitor timely and improved maintenance delivery to residents																		X			









DIVISION/DEPT: CONVENTIONAL HOUSING MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1 2 3 4				1 2 3 4				1 2 3 4				1 2 3 4				1 2 3 4			
Timely Completion of Re-examinations and Home Inspections																					
TASKS:																					
1. Complete all re-examinations prior to anniversary date		X																			
2. Establish monitoring procedure for re-examinations		X																			
3. Establish procedure to conduct home inspections in conjunction with preventive maintenance program						X															
4. Establish computer program to monitor home inspections										X											



DIVISION/DEPT: MAINTENANCE		YEAR 1												YEAR 2												YEAR 3												YEAR 4												YEAR 5											
OBJECTIVES/TASKS/SUBTASKS		CROSS TRAINING																																																											
TASK 1 - ESTABLISH QUARTERLY SEMINARS WITH ALL CRAFT PERSONNEL WHICH WILL ENCOMPASS ALL FACETS OF HOUSING MANAGEMENT OPERATIONS AND SOCIAL PROGRAMS WITH INPUT FROM AUTHORITY STAFF, TO INSURE THAT MAINTENANCE & MANAGEMENT STAFF WILL BE ABLE TO EFFECT A TEAM WORK CONCEPT BETWEEN THE TWO.		X																																																											
SUBTASK 1 - SEMINARS HELD QUARTERLY BY KEY MANAGEMENT PERSONNEL TO FAMILIARIZE MAINTENANCE PERSONNEL WITH MANAGEMENT OPERATIONS AND TO SHOW WHY PARTNERSHIP BETWEEN MANAGEMENT AND MAINTENANCE IS ESSENTIAL.																																																													
SUBTASK 2 - EXPOSURE OF MAINTENANCE TO MANAGEMENT OPERATIONS POLICY AND PROCEDURES																																																													
SUBTASK 3 - IN HOUSE SEMINARS BY SOME PRIVATE FIRMS ON EFFECTIVE PROPERTY MANAGEMENT.																																																													
TASK 2 - MAINTENANCE WILL THROUGH VARIOUS MEANS EFFECTIVELY FAMILIARIZE SITE MANAGERS & TENANT LEADERS THE PROCESS OF MAINTAINING DWELLING UNITS TO DECREASE MAINTENANCE COSTS AND PROLONG THE VIABILITY FO THE UNITS.																																																		X											
SUBTASK 1 - SEMINARS ON PREVENTIVE MAINTENANCE THROUGH EFFECTIVE INSPECTIONS																																																													
SUBTASK 2 - USE OF INSPECTION COURSES TO FAMILIARIZE MANAGEMENT PERSONNEL AND KEY TENANT LEADERS (CAN BE FORMULATED IN HOUSE BY SFHA PERSONNEL)																																																													
SUBTASK 3 - FAMILIARIZE SITE MANAGERS AND SITE MAINTENANCE PERSONNEL PROCEDURES THROUGH JOINT INSPECTIONS ON MOVE-OUTS, ANNUAL INSPECTIONS, AND MONTHLY INSPECTIONS.																																																		X											



DIVISION/DEPT: MAINTENANCE		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUBTASK 4	- TEACH SITE MANAGERS HOW TO DO AN ASSESSMENT OF WORK REQUIREMENTS IN DWELLING UNITS																				
	TASK 3 - KEY MAINTENANCE PERSONNEL WILL INCORPORATE RESIDENTS, TENANT LEADERS AND OTHER AGENCIES TO FORM A PARTNERSHIP TO CLEAR UP MAINTENANCE PROBLEMS AND IMPROVE MAINTENANCE SERVICES.																				
SUBTASK 1	- GET INPUT ON PROBLEM AREAS ALONG WITH POSSIBLE SOLUTIONS FROM THE GROUPS ABOVE																				
SUBTASK 2	- GET THE RESIDENT AND TENANTS INVOLVED THROUGH AWARENESS ON THE DESTRUCTION OF DWELLING UNITS BY TENANTS AND ENCOURGE THEM TO DISCOURAGE SUCH ACTIONS.																				



DIVISION/DEPT: MAINTENANCE	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	TO ESTABLISH AND DEVELOP A PREVENTIVE MAINTENANCE PROGRAM.																				
	<u>TASK 1</u> - TO DETERMINE WHAT OPERATIONS ARE REQUIRED, HOW OFTER THEY ARE TO BE PERFORMED, AND WHAT CRAFT SKILL IS REQUIRED TO DO THE WORK. _____				X																
	<u>TASK 2</u> - TO DEVELOP A SCHEDULE DELINEATING WHEN SPECIFIC TYPES OF MAINTENANCE WORK ARE TO BE PERFORMED. _____				X																
	<u>TASK 3</u> - TO DETERMINE THE AMOUNT OF CRAFT SKILLS REQUIRED TO PERFORM THE VARIOUS ELEMENTS OF WORK. _____				X																
	<u>SUB-TASK 1</u> - CARPENTRY, PAINT, ELECTRICAL, PLUMBING OR OTHER. _____																				
	<u>TASK 4</u> - TO DETERMINE WHICH MAINTENANCE FUNCTIONS SHOULD BE CONTRACTED OR IF IT CAN BE PERFORMED IN-HOUSE. _____				X																
	<u>SUB-TASK 1</u> - REVIEW IN TERMS OF COST. _____																				
	<u>SUB-TASK 2</u> - REVIEW IN TERMS SFHA PERSONNEL ABILITY TO HANDLE THE JOB. _____																				
	<u>TASK 5</u> - TO ESTABLISH A PRIORITY SYSTEM WHICH WILL DEFINE THE ORDER OF PRECEDENCE IN ASSIGNING THE ACCOMPLISHMENT OF SPECIFIC FUNCTIONS. _____																				





DIVISION/DEPT: MAINTENANCE												
	<u>YEAR 1</u>				<u>YEAR 2</u>				<u>YEAR 3</u>			
	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS	1	2	3	4	1	2	3	4	1	2	3	4
TO ESTABLISH AND DEVELOP A PREVENTIVE MAINTENANCE PROGRAM.												
<u>TASK 6</u> - TO DEVELOP A SYSTEM OF COLLECTING COMPLETED WORK ORDERS FOR THE PURPOSE OF COMPARING ACTUAL PERFORMANCE TIME WITH AN ASSIGNED STANDARD.												
<u>SUB-TASK 1</u> - REVIEW PREVENTIVE MAINTENANCE WORK ORDERS QUARTERLY TO DETERMINE HOW MUCH TIME IN NEEDED TO PERFORM THE FUNCTION.												
<u>SUB-TASK 2</u> - ADJUST ACCORDINGLY IF NEEDED.												



DIVISION/DEPT: MAINTENANCE		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																					
TO IMPROVE OVERALL APPEARANCE OF BUILDINGS' AND GROUNDS IN AN EFFORT TO PROJECT AN AESTHETIC IMAGE IN THE COMMUNITY.		X																			
TASK 1 - TO REDEFINE AND IMPLEMENT A GROUNDS-KEEPING MAINTENANCE PROGRAM, EXPANDING THE PRESENT BOUNDARIES OF THE LABORER CREW.		X																			
SUB-TASK 1 - CLEAN UP EACH PROPERTY (GROUNDS) AND BUILDINGS THEN SCHEDULE CLEAN-UP EACH WORK DAY OF BUILDING AND GROUNDS.																					
SUB-TASK 2 - DEVELOP A SCHEDULE FOR CUTTING GRASS AND OTHER MEASURES NEEDED TO MAINTAIN GOOD CURB APPEAL.																					
TASK 2 - TO DEVELOP A LANDSCAPE MAINTENANCE PROGRAM WITH APPROPRIATE PERSONNEL AND/OR OUTSIDE RESOURCES.		X																			
SUB-TASK 1 - DETERMINE TYPE OF LANDSCAPING FORMAT TO BE USED FOR EACH PROPERTY.																					
SUB-TASK 2 - DETERMINE LANDSCAPING MAINTANCE SCHEDULE TO PRESERVE THE BEAUTY OF THE LANDSCAPING.																					



DIVISION/DEPT: MAINTANCE	OBJECTIVES/TASKS/SUBTASKS	YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		1 2 3 4					1 2 3 4					1 2 3 4					1 2 3 4					1 2 3 4				
		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
	IMPROVE DISPATCH PROCEDURES AND OVERALL CONTROL ROOM EFFICINECY.																									
	<u>TASK 1</u> - ENSURE THAT EACH MEMBER OF THE CONTROL STAFF IS TRAINED IN PROFESSIONAL COMMUNICATION SKILLS.					X																				
	<u>SUB TASK 1</u> TRAIN THROUGH SEMINARS OF PROFESSIONAL COMMUNICATION SKILLS.																									
	<u>TASK 2</u> - DEFINE THE DUTIES OF EACH PERSON ON THE CONTROL ROOM STAFF.					X																				
	<u>SUB TASK 1</u> DISTRIBUTE THE DUTIES TO STAFF IN WRITTING TO INCREASE ADHERENCE.																									
	<u>TASK 3</u> - TO PROVIDE PERIODIC TRAINING OF STAFF MEMBERS ON DATA ENTRY PROCEDURES FOR INPUT OF WORK ORDERS AND ALL ASPECTS OF ROUTING.					X																				
	<u>SUB TASK 1</u> PERIODIC TRAINING SHOULD BE ACCOMPLISHED THROUGH IN HOUSE TRAINING SEMINARS.																									
	<u>TASK 4</u> - ENSURE THAT STAFF ARE USING PROPER EQUIPMENT (HEADSETS) TO MORE EFFICIENTLY AND ACCURATELY HANDLE WORK ORDERS.																									
	<u>SUB TASK 1</u> MONITOR STAFF TO ENSURE THERE IS CONTINUOUS USE OF PROPREEQUIPMENT.																									
	<u>TASK 5</u> - TO DEVELOP A MANUAL COVERING STEP-BY-STEP PROCEDURES ON THE WORK ORDER SYSTEM, DISPATCH PROCEDURES AND OVER-ALL MAINTANCE-OPERATION SYSTEM.					X																				



DIVISION/DEPT: MAINTENANCE												
	YEAR 1				YEAR 2				YEAR 3			
	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS	1	2	3	4	1	2	3	4	1	2	3	4
<u>TASK 5 (Continued)</u>												
<u>SUB-TASK 1</u> - DISTRIBUTE DEVELOPED MANUAL TO WORK ORDER SYSTEM PERSONNEL												
<u>SUB-TASK 2</u> - DISCUSS THE MANUAL AND CLEAR-UP ANY QUESTIONS OR ISSUES RAISED.												
<u>TASK 6</u> - ESTABLISH TELEPHONE BREAKS TO RELIEVE CONTROL ROOM STAFF FROM THE TELEPHONES AND UTILIZE THESE BREAK PERIODS TO ELIMINATE THE FILING BACKLOG AND ESTABLISH A DAILY FILING OF WORK ORDERS.												
<u>SUB-TASK 1</u> - SET BREAKS RELATIVE TO OPERONNEL SO THAT THERE WILL BE NO INTERRUPTION OF SERVICE.								X				





DIVISION/DEPT: MAINTENANCE		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
CONTROL ROOM																					
TASK 7 - ENSURE THAT ALL ADMINISTRATIVE STAFF IN THE MAINTENANCE DEPARTMENT ARE TRAINED AND UTILIZED TO ASSIST THE CONTROL ROOM STAFF AS NEEDED.																					
SUB-TASK 1 - ADMINISTRATIVE MAINTENANCE STAFF SHOULD BE TRAINED WITH CONTROL ROOM STAFF.																					
TASK 8 - TO MONITOR THAT ALL CALLS FOR SERVICE REQUESTS ARE ANSWERED PROMPTLY AND COURTEOUSLY.																					
SUB-TASK 1 - KEY MAINTENANCE PERSONNEL WILL SIT IN PERIODICALLY TO MONITOR AND DO WRITTEN SYNOPSIS OF FINDINGS, AND TAKE CORRECTIVE MEASURES IF NECESSARY.																					
TASK 9 - ESTABLISH PROFESSIONAL CLERICAL PROCEDURES FOR THE CONTROL ROOM STAFF, OFFERING REFRESHER COURSES IN BASIC OFFICE SKILLS.																					
SUB-TASK 1 - BASIC OFFICE SKILLS SHOULD BE OFFERED TO STAFF BY OUTSIDE ORGANIZATIONS TO INCREASE THE EFFECTIVENESS OF THE TRAINING.																					



DIVISION/DEPT:	MAINTENANCE												
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3			
		1	2	3	4	1	2	3	4	1	2	3	4
		1	2	3	4	1	2	3	4	1	2	3	4
DEVELOP AND APPLY JOB PERFORMANCE STANDARDS TO CONTROL ALL FACETS OF MAINTENANCE AND REHABILITATION FUNCTIONS.													
<u>TASK 1</u> - THERE IS A NEED TO REVISE THE STANDARDS DEVELOPED BASED ON THE NATIONAL CONSTRUCTION STANDARDS, CONSISTANT WITH THE UNIQUE TYPE OF OPERATIONS ENCOUNTERED IN MAINTAINING PUBLIC HOUSING DEVELOPMENTS.													
<u>TASK 2</u> - DEVELOP A SYSTEM OF REVIEWING MAN HOURS TAKEN TO COMPLETE SERVICE REQUESTS ON MAKE READY WORK.													
<u>SUB-TASK 1</u> - DETERMINE IF TIME USED IS ACCEPTABLE.													
<u>SUB-TASK 2</u> - MAKE ADJUSTMENTS IF NECESSARY.													



DIVISION/DEPT: MAINTENANCE	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	TO ATTAIN A MAXIMUM TURN-AROUND OF 30 DAYS FOR ALL VACANT UNITS.																				
	<u>TASK 1</u> - TO DEVELOP A SYSTEM OF EXTRACTING UP-TO-DATE INFORMATION OF UNITS VACATED THROUGH THE USE OF VACATE SUMMARIES. _____																				
	<u>SUB-TASK 1</u> - VACATED UNITS ARE TO BE IMMEDIATELY PLACED IN THE ORDER OF VACATED DATES, TO BE PLACED IN MAKE-READY STATUS FOR WORK TO BE IMPLEMENTED TO MEET THE 30-DAY TIME LIMIT.																				
	<u>TASK 2</u> - COORDINATE THE MULTIPLE STAGES OF THE REHABILITATION PROCESS. _____																				
	<u>SUB-TASK 1</u> - SCHEDULE CRAFT WORK BY PROPER SEQUENCE. EXAMPLE: CLEAN-UP, SHEET ROCK, REPAIR, ETC.																				
	<u>TASK 3</u> - TO PROVIDE THE ELIGIBILITY BRANCH AN ACCURATE PROJECTION OF UNIT AVAILABILITY DATE. _____																				



DIVISION/DEPT: MANAGEMENT OPERATIONS		YEAR 1			YEAR 2			YEAR 3			YEAR 4			YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEVELOP BUILDINGS AND GROUNDS INSPECTION PROGRAM																	
1. DETERMINE SCOPE AND FREQUENCY OF INSPECTIONS		X															
2. ESTABLISH SCHEDULES		X															
3. DEVELOP INTERFACE WITH WORK ORDER SYSTEM TO ASSURE PROMPT REMEDIATION OF DEFICIENCIES							X										
4. DEVELOP FORMS							X										
5. TRAIN STAFF							X										
6. BEGIN FORMAL IMPLEMENTATION							X										





DIVISION/DEPT: MANAGEMENT OPERATIONS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEVELOP AND IMPLEMENT A DECENTRALIZED MAINTENANCE DELIVERY SYSTEM																					
1. ASSESS/REVIEW WORK ORDER (HISTORY AT EACH DEVELOPMENT)		X																			
2. DETERMINE DEVELOPMENT BASED STAFFING NEEDS BY DEVELOPMENT/CRAFT			X																		
3. DRAFT DEPLOYMENT SCHEDULES			X																		
4. PERFORM FISCAL ANALYSES			X																		
5. COMPLETE REQUIRED MEET/CONFER					X																
6. DETERMINE IMPLEMENTATION SCHEDULE					X																
7. BEGIN IMPLEMENTATION																					



DIVISION/DEPT: MANAGEMENT OPERATIONS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEVELOP/IMPLEMENT A LIVING UNIT INSPECTION PROGRAM																					
1. WRITE SPECIFICATION OF SCOPE OF INSPECTION					X																
2. DEVELOP INSPECTION SCHEDULES					X																
3. DEVELOP INTERFACE BETWEEN INSPECTION AND WORK ORDER SYSTEM							X														
4. DEVELOP REQUIRED FORMS							X														
5. TRAIN INSPECTORS/STAFF							X														
6. BEGIN ANNUAL INSPECTION PROGRAM																					



DIVISION/DEPT:

90-91

91-92

OBJECTIVES/TASKS /SUBTASKS: DEVELOPE ACTION AND  
PREVENTIVE MAINTENANCE PROGRAM FOR ALL EMERGENCY  
AND MECHANICAL SYSTEMS IN ELDERLY DEVELOPMENTS.

YEAR 1

YEAR 2

YEAR 3

YEAR 4

YEAR 5

1 2 3 4

1 2 3 4

1 2 3 4

1 2 3 4

1 2 3 4

TASKS:

1. SURVEY ALL DEVELOPMENTS

2. LIST/INVENTORY/DIAGRAM ALL EMERGENCY AND  
MECHANICAL SYSTEMS

3. ESTABLISH PREVENTIVE MAINTENANCE SCHEDULES

4. DEVELOP INSPECTION SCHEDULES

5. PUBLISH MANUALS

6. TRAIN STAFF

7. BEGIN IMPLEMENTATION

0 0

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**DIVISION/DEPT:**

**OBJECTIVES/TASKS/SUBTASKS :** DEVELOP INVENTORY AND PREVENTIVE MAINTENANCE SCHEDULE FOR POWER PLANTS

**TASKS:**

1. SURVEY ALL DEVELOPMENT POWER PLANTS
2. LIST/INVENTORY/DIAGRAM ALL EQUIPMENT IN EACH , PLANT
3. DEVELOP DAILY/WEEKLY/MONTHLY/QUARTERLY/ SEMI-ANNUAL/ANNUAL PREVENTIVE MAINTENANCE SCHEDULES
4. PUBLISH MANUAL FOR EACH DEVELOPMENT
5. BEGIN FORMAL IMPLEMENTATION

**YEAR 1**      **YEAR 2**      **YEAR 3**      **YEAR 4**      **YEAR 5**

**1 2 3 4**      **1 2 3 4**      **1 2 3 4**      **1 2 3 4**      **1 2 3 4**

0 0

0

0

0 0

0





## RESIDENT SERVICES

Today the San Francisco Housing Authority has to take a pro-active approach in supporting the needs of families within our developments. The families in our developments have many social, economical and personal developmental needs. The San Francisco Housing Authority cannot begin to address all of these needs but we can advocate on behalf of our residents and be a vehicle through which we can be assured that they receive these basic services. The goal of our effort is to identify, coordinate and implement a comprehensive structure of support services for children, youth and families and to work with City departments and community agencies to locate services at Authority sites. Our objectives are to strengthen the feeling of community, to create employment opportunities for our residents, improve health services, create detoxification opportunities, improve educational opportunities, recreational, social services, youth counseling programs and other supportive services.

1. Strengthen the feeling of community by:

Organizing the residents and strengthening Resident Councils,  
Enhancing positive neighborhood interaction through conflict resolution services to resolve community, family and other disputes,  
Promoting activities such as community clean-up, gardens and playgrounds that encourage community pride, and  
Conducting resident training, leadership training, meetings, parenting techniques, good housekeeping, CPR, etc.



2. Create employment opportunities for residents by:

Developing a relationship with various public and private organizations to bring employment related services to our residents,  
Establishing job boards at the developments,  
Establishing on-site employment agencies,  
Instituting labor union assisted training programs,  
Exploring summer job opportunities for youth at target sites, and  
Expanding cooperation and helping coordinate vocational training/employment programs and drug education programs and counseling.

3. Improve health services by:

Establishing on-site health clinics,  
Establishing education and prevention programs to help stop drug abuse before it starts (Primary Prevention),  
Establishing programs to prevent drug use from becoming drug abuse (Secondary Prevention), and  
Establishing programs to treat the drug abuser to prevent further problems (Tertiary Prevention).

4. Create detoxification opportunities by:

Advocating for affordable, accessible out-patient programs, and  
Advocating for affordable residential programs.



5. Improve educational opportunities by:
  - Establishing on-site alternative school programs, and
  - Establishing tutorial and study hall programs.
  
6. Improve recreational opportunities by:
  - Establishing on-site recreational programs, and
  - Providing access to cultural enrichment activities.
  
7. Improve social services to the developments by providing on-site social workers.
  
8. Create a youth counseling program by:
  - Developing youth centers in a safe and drug-free environment,
  - Developing a mentor program for youth,
  - Developing youth councils,
  - Working with local resident councils to include a youth representative,
  - Developing supervised latch-key programs for pre-teens for peer support, tutoring, drug prevention and other related activities,
  - Forming a coalition of government agencies/private business/community agencies to expand year-round and summertime job opportunities for high risk youths,
  - Establishing co-dependent meetings for youth who have parents, relatives or friends who have drug or alcohol dependency problems,



Developing and expanding educational peer counseling programs,  
Working with the School District to enhance educational opportunity for youth  
in public housing, and  
Working with the City and non-profit agencies to develop programs that  
addresses the needs of the whole child.

## BRIEF DESCRIPTION OF IMPORTANCE OF OBJECTIVES

Objective 1: To identify, coordinate and implement a comprehensive structure of support services for children, youth and families in our developments.

Buildings within our developments are frequently plagued with graffiti and other acts of vandalism. Garbage and glass throughout the grounds is a common sight. Many of the units within the developments are not habitable due to resident abuse

Many of our residents are single women, head of households with the average family size being 3.2 members. Over 49% of our population is under the age of 18. The primary source of income for our residents is AFDC and social security. Many of our families are plagued with unemployment, teen pregnancy, high school dropout, illiteracy, child abuse and other social problems.





The San Francisco Housing Authority has 23 family developments and 22 senior. Each development is unique and some sites have greater needs than others. To be effective we must identify and set priorities for the developments with the greatest needs. Our overall plan for addressing the social problems must be comprehensive. Building community pride and addressing the social problems must happen simultaneously with the Authority's efforts to improve the aesthetics of the developments.

Objective 2: Create a better understanding of the needs of our residents and to educate SFHA staff on resources available to our residents.

It is extremely important that the employees understand the special needs of the population we serve. Our employees are required to exercise a level of sensitivity and awareness of the needs of an economically deprived population while at the same time they must be stern and effective property managers.

Unfortunately, our developments are plagued with drug-related activities. Employees of the Authority must be educated on substance abuse and be trained on how to respond to someone who may be under the influence.

The property managers are the front line staff of the agency. They are not trained in providing direct support services to our residents, but if they can be equipped with resource information and trained on how to disseminate this



information to the families, they can become a very valuable resource.

Objective 3: Support the needs of the family to enhance self-efficiency.

Over 80% of the families in our developments are single parents. Many of the families are trying to recover from substance abuse. The children have become the greatest victim in this decade of poverty and drug abuse. We must work hard to support and preserve the family. When the family system breaks down, we must save the children for they are the innocent ones.

Objective 4: Stabilize and increase staff of Resident Services Division.

With over 30,000 residents and at least 50% of this population being the highest at risk in the City, the support needs are overwhelming. If this agency is going to be an effective vehicle to advocate for and implement a comprehensive structure of support services, we must have the staff to effectively and efficiently accomplish this task.

Resident Services 5-year plan is a target site approach setting priorities for the distressed developments identified in the *Six Month Report* for comprehensive structure of support services.



## 1. Management Initiatives

### A. Resident Management

Clearly the first step toward Resident Management has to be through developing a sense of community pride. By promoting activities such as community clean-up, gardening and graffiti removal residents develop a sense of ownership of their development. The more activities the residents participate in the stronger the resident council becomes. It is also extremely important that the residents are trained in conflict resolution service to resolve community and other disputes. As the residents master the above activities they can begin to move towards Resident Management.

### B. Resident Business Initiatives

Within the San Francisco Housing Authority Developments there are many non-management functions in which residents could be trained to perform. In Objective 1, Task 3 we list as a task to "seek economic opportunities for residents around business opportunities. We plan to activate this task by working with various public and private organizations to train residents on business opportunities. Work with residents to acquire funding for business opportunities. Encourage resident hiring within San Francisco Housing Authority so that they can acquire job skills.

### C. Private Management

As we begin to include residents in the selection of contractors rendering services to the Authority it is extremely important that they are trained in this process, this would include private management.



**D. Decentralization**

Centralized or decentralized can only be effective if our residents take pride in their development and work with us to preserve its quality. We must train residents around minor repairs, painting their units, preventive maintenance etc.

**F. Admission Policies and Procedures**

Not addressed in five year plan.

**2. Resident Organization**

Finding the balance between resident empowerment and the training to empower is a very difficult task for the Authority. It is real clear for us to be effective, we need a strong city-wide tenants association. We hope to accomplish this task by training with the leadership at target developments. Identifying new leadership and encouraging outside agencies to train residents.

**3. Privation/Resident Responsibility**

Objective 2, Task 1

**4. Fiscal Stability**

Seek outside funding to support activities of Resident Management.

**5. Modernization/Capital Development**

Not addressed in five year plan.

**6. Management of Information**

Not addressed in five year plan.

**7. Social Services/Drug Elimination/Security**

Objective 1





Task 3      Task 8

Task 5      Task 9

Task 6

Continue to work with city and non-profit agencies in bringing support services to residents.

8.      **Affirmative Action**

Not addressed.

9.      **State Legislative Agenda**

Introduce an advocate for legislation.



DIVISION/DEPT:	RESIDENT SERVICES
OBJECTIVES/TASKS/SUBTASKS	
<b>OBJECTIVE 1.</b> To identify, coordinate and implement a comprehensive structure of support services for children, youth and families in our developments.	
TASK 1. Identify and set priorities to which developments in which services will be targeted.	
Alice Griffith (1)	
Plaza East (2)	
Valencia Gardens (3)	
Sunnydale (4)	
Hunters View (5)	
Hayes Valley (6)	
Potrero Hill (7)	
TASK 2. Strengthen the feeling of community.	
Encourage resident organizing and strengthening of Resident Councils.	
Enhancing positive neighborhood interaction through conflict resolution services to resolve community, family and other disputes.	
Promoting activities such as community clean-up, gardens and playgrounds that encourage community pride.	
Integrate activities of developments with community at large.	



DIVISION/DEPT: RESIDENT SERVICES

OBJECTIVES/TASKS/SUBTASKS

**TASK 3. Create employment opportunities for residents.**

Develop a relationship with various public and private organizations to bring employment related services to our residents.

Establish job boards at the developments.

Establish on-site employment agencies.

Institute labor union assisted training programs.

Explore summer job opportunities for youth at target sites.

Expand cooperation and help coordinate vocational training/employment programs and drug education programs and counseling.

Seek economic opportunities for residents around business opportunities.

**TASK 4. Improve health services.**

Establish on-site health clinics.

Develop outreach programs on AIDS, pre-natal care and other health issues.

Establish education and prevention programs to help stop drug abuse before it starts (Primary Prevention).

Establish programs to help prevent drug use from becoming drug abuse (Secondary Prevention).

Establish programs to treat the drug abuser to prevent further problems (Tertiary Prevention).

**TASK 5. Create detoxification opportunities.**

Advocate for affordable, accessible out-patient programs.



DIVISION/DEPT: RESIDENT SERVICES																					
	OBJECTIVES/TASKS/SUBTASKS																				





DIVISION/DEPT: RESIDENT SERVICES		YEAR 1																				YEAR 2																				YEAR 3																				YEAR 4																				YEAR 5																																							
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4																																																																																				
OBJECTIVES/TASKS/SUBTASKS																																																																																																																									
TASK 9. Create youth counseling and other supportive programs.																																																																																																																									
Develop a mentor program for youth.		1/2																				3/4																				5																				6																				7																																							
Develop youth councils.		1/2																				3/4																				5																				6																				7																																							
Work with local resident councils to include a youth representative.		1/2																				3/4																				5																				6																				7																																							
Develop supervised latch-key programs for pre-teens for peer support, tutoring, drug prevention and other related activities.		1/2																				3/4																				5																				6																				7																																							
Form a coalition of government agencies/private business/community agencies to expand year-round and summertime job opportunities for high risk youth.		1/2																				3/4																				5																				6																				7																																							
Establish co-dependent meetings for youth who have parents, relatives or friends who have drug or alcohol dependency problems.		1/2																				3/4																				5																				6																				7																																							
Develop and expand educational peer counseling programs.		1/2																				3/4																				5																				6																				7																																							
Work with the School District to enhance educational opportunity for youth in public housing.		1/2																				3/4																				5																				6																				7																																							
Work with the City and non profit agencies to develop programs that address the needs of the whole child.		1/2																				3/4																				5																				6																				7																																							
OBJECTIVE 2. Create a better understanding of the needs of our residents and to educate SFHA staff on resources available to our residents.																																																																																																																									
TASK 1. Host an annual gathering of resident leaders to access the needs of residents in our developments.																																																																																																																									
Develop training programs for residents of SFHA (resident leadership, resident minor repairs, parenting, etc.).		1/2																				3/4																				5																				6																				7																																							



DIVISION/DEPT: RESIDENT SERVICES																
	YEAR 1				YEAR 2				YEAR 3				YEAR 4			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Create a resource book for property managers and resident leaders on social and economical resources for residents.																
Schedule training inservices three (3) times a year for staff that work with residents.																
<b>OBJECTIVE 3.</b> Support the needs of the family to enhance self-efficiency.																
TASK 1. Create a Children's House (a safe place where children go and receive support services, i.e. food, clothing, counseling, etc.).	1/2				3/4				5				6			7
TASK 2. Develop childcare programs at or near family development sites.	1/2				3/4				5				6			7
TASK 3. Develop at least one drug-free family development.																
Develop two floors of drug-free housing.																
TASK 4. Develop support groups for women, adolescents, grandparents, co-dependents and for people in recovery.																
TASK 5. Develop comprehensive demographic data on residents.																
<b>OBJECTIVE 4.</b> Division.																
TASK 1. Seek additional funding to support activities of the Division.																
TASK 2. Access and set in priority order the needs of our residents and implement programs to support those needs.																
TASK 3. Establish on-going communication with other Departments within SFHA and throughout the city.																
TASK 4. Establish an advisory board of residents and community at large to advise on activities of the Division.																



## **CAPITAL IMPROVEMENT AND RENEWAL**

Pursuant to the Executive Director's request for Divisions to analyze their current problems and prepare strategies for improvements within a five year period, Planning and Construction staff met to determine a course of action. The following is a five year plan for this Division.

### **Objective 2: Create new housing Opportunities.**

The position of the SFHA Commission on new development and scarce Federal resources have taken the Authority out of the development field for new housing over the past years.

With a waiting list of 1,800 for senior and 1,200 for family units, it is imperative that the Authority initiate various programs for the construction of new housing. The required skills for such an undertaking are on board and ready to commence with the work.

### **Objective 3: Increase individual staff effectiveness and efficiency.**

The Authority is charged with the responsibility of providing housing to the very low income community of this City. These individuals and families come to us in desperate need of housing assistance. those who are successfully



placed in our developments expect and are entitled to receive housing management and maintenance service sufficient to maintain the required minimum standards. In order to meet our obligation to accommodate this clientele, Authority staff must be qualified, effective and efficient in performing their duties. In order to achieve this objective, Authority staff must be well trained in their areas of responsibility and maintain a thorough general knowledge of Authority operations and procedures. Additionally, they must have the authority to carry out their duties in a professional manner.

**Objective 4: Improve inter-divisional communication and coordination.**

Activities and plans of the various divisions within the Authority directly effect the activities and plans of other divisions. As well, expertise and experience of some divisions may be helpful to the efforts of other division.

This objective seeks to achieve a more efficient operation of the Authority as a whole by assuring all divisions are informed of each others activities and plans, by bringing division problems and operational procedures, which may influence other division's procedures, to a common body of expertise and by reviewing functions and assignment of responsibilities within divisions.





**Objective 5: Review and improve the Authority's housing development and housing rehabilitation processes and procedures.**

It is critical that all new and rehabilitated housing complexes be well designed and efficiently constructed. Incomplete designs, that do not address the needs of residents or the Authority, are a waste of an important opportunity and will result in future costs for the Authority and difficulties for residents. Poor construction administration can increase costs and delay work completion. It is therefore important that the Authority ensure that procedures are in place to address both design and construction efforts in a comprehensive and competent manner.

**Objective 6: Review and improve the Planning and Construction Division's organizational structure and resources to ensure effectiveness and efficiency.**

The Planning and Construction Division plays a critical role in applying for special funding, designing and constructing new developments, correcting serious physical problems and modifying existing developments to improve security, safety and liveability. All of these functions must be pursued in a timely and comprehensive way. It is therefore mandatory that the Division have in place the structure and resources to provide this work efficiently. If the appropriate systems are not in place, modifications and improvements should be made.



**DIVISION/DEPT: PLANNING and CONSTRUCTION**

## OBJECTIVES/TASKS/SUBTASKS

## OBJECTIVE # 2

## IMPROVE INTER-DIVISIONAL COMMUNICATIONS AND COORDINATION

\*\*\*\*\*

## TASK #1

ESTABLISH AUTHORITY WIDE QUALITY CIRCLE PROGRAMS

## Step #1

Determine continuing issues to be resolved through inter-branch coordination and expertise

## Step #2

Establish charter of quality circle operations and charges for each committee

### Step #3

Appoint standing quality circle group members  
and commence operation

[illegible]

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YEAR 2

1 2 3 4

YEAR 3

1 2 3 4

**YEAR 4**

1 2 3 4

YEAR 5

1 2 3 4



	<u>YEAR 1</u>	<u>YEAR 2</u>	<u>YEAR 3</u>	<u>YEAR 4</u>	<u>YEAR 5</u>
1. <b>Revenue</b>					
2. <b>Cost of sales</b>					
3. <b>Gross profit</b>					
4. <b>Operating expenses</b>					
5. <b>Operating income</b>					
6. <b>Other income</b>					
7. <b>Income before taxes</b>					
8. <b>Taxes</b>					
9. <b>Net income</b>					
10. <b>Dividends</b>					
11. <b>Retained earnings</b>					

	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1

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Re-examine and publish division titles, staffing  
roles and responsibility descriptions



DIVISION/DEPT: PLANNING and CONSTRUCTION		<u>YEAR 1</u>				<u>YEAR 2</u>				<u>YEAR 3</u>				<u>YEAR 4</u>				<u>YEAR 5</u>			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<u>OBJECTIVE # 2</u>																					
IMPROVE INTER-DIVISIONAL COMMUNICATIONS AND COORDINATION *****																					
<u>TASK #3</u>																					
INSTITUTE USEFUL INTER-DIVISIONAL REPORTS																					
Step #1																					
Determine information required of each branch activity for dissemination Authority-wide																					
Step #2																					
Each division to develop reporting format for requested information and information desired to be disseminated																					
Step #3																					
Reporting frequency and production cost approved																					
Step #4																					
Commence regular issuance																					









DIVISION/DEPT: PLANNING and CONSTRUCTION	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	<p><u>OBJECTIVE # 3</u></p> <p>INCREASE INDIVIDUAL STAFF EFFECTIVENESS, EFFICIENCY AND MOTIVATION.</p> <p>*****</p> <p><u>TASK #1</u></p> <p>DEVELOP OPERATIONAL AND PROCEDURAL MANUALS ADDRESSING ALL MAJOR AGENCY OPERATIONS USING HUD HANDBOOKS AS REFERENCE (i.e. Section 8, CIAP Program, CDBG Program, Maintenance Procedures and Operations, etc.)</p> <p>Step #1</p> <p>Obtain all relevant current HUD Manuals, pertaining to Housing Authority operations</p> <p>Step #2</p> <p>Identify and define procedures to be written and assign to appropriate staff</p>																				



	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
1. <i>Number of employees</i>					
2. <i>Number of employees in production</i>					
3. <i>Number of employees in sales</i>					
4. <i>Number of employees in administration</i>					
5. <i>Number of employees in maintenance</i>					
6. <i>Number of employees in training</i>					
7. <i>Number of employees in research and development</i>					
8. <i>Number of employees in quality control</i>					
9. <i>Number of employees in logistics</i>					
10. <i>Number of employees in customer service</i>					
11. <i>Number of employees in finance</i>					
12. <i>Number of employees in legal</i>					
13. <i>Number of employees in human resources</i>					
14. <i>Number of employees in information technology</i>					
15. <i>Number of employees in operations</i>					
16. <i>Number of employees in procurement</i>					
17. <i>Number of employees in marketing</i>					
18. <i>Number of employees in product development</i>					
19. <i>Number of employees in project management</i>					
20. <i>Number of employees in risk management</i>					
21. <i>Number of employees in compliance</i>					
22. <i>Number of employees in sustainability</i>					
23. <i>Number of employees in corporate social responsibility</i>					
24. <i>Number of employees in corporate governance</i>					
25. <i>Number of employees in corporate strategy</i>					
26. <i>Number of employees in corporate communications</i>					
27. <i>Number of employees in corporate relations</i>					
28. <i>Number of employees in corporate security</i>					
29. <i>Number of employees in corporate risk</i>					
30. <i>Number of employees in corporate audit</i>					
31. <i>Number of employees in corporate legal</i>					
32. <i>Number of employees in corporate finance</i>					
33. <i>Number of employees in corporate accounting</i>					
34. <i>Number of employees in corporate tax</i>					
35. <i>Number of employees in corporate insurance</i>					
36. <i>Number of employees in corporate pension</i>					
37. <i>Number of employees in corporate benefits</i>					
38. <i>Number of employees in corporate compensation</i>					
39. <i>Number of employees in corporate performance</i>					
40. <i>Number of employees in corporate innovation</i>					
41. <i>Number of employees in corporate research</i>					
42. <i>Number of employees in corporate development</i>					
43. <i>Number of employees in corporate testing</i>					
44. <i>Number of employees in corporate deployment</i>					
45. <i>Number of employees in corporate support</i>					
46. <i>Number of employees in corporate training</i>					
47. <i>Number of employees in corporate documentation</i>					
48. <i>Number of employees in corporate communication</i>					
49. <i>Number of employees in corporate collaboration</i>					
50. <i>Number of employees in corporate engagement</i>					
51. <i>Number of employees in corporate motivation</i>					
52. <i>Number of employees in corporate leadership</i>					
53. <i>Number of employees in corporate management</i>					
54. <i>Number of employees in corporate organization</i>					
55. <i>Number of employees in corporate structure</i>					
56. <i>Number of employees in corporate culture</i>					
57. <i>Number of employees in corporate values</i>					
58. <i>Number of employees in corporate beliefs</i>					
59. <i>Number of employees in corporate attitudes</i>					
60. <i>Number of employees in corporate behaviors</i>					
61. <i>Number of employees in corporate actions</i>					
62. <i>Number of employees in corporate decisions</i>					
63. <i>Number of employees in corporate choices</i>					
64. <i>Number of employees in corporate preferences</i>					
65. <i>Number of employees in corporate interests</i>					
66. <i>Number of employees in corporate desires</i>					
67. <i>Number of employees in corporate needs</i>					
68. <i>Number of employees in corporate wants</i>					
69. <i>Number of employees in corporate requirements</i>					
70. <i>Number of employees in corporate expectations</i>					
71. <i>Number of employees in corporate hopes</i>					
72. <i>Number of employees in corporate dreams</i>					
73. <i>Number of employees in corporate aspirations</i>					
74. <i>Number of employees in corporate ambitions</i>					
75. <i>Number of employees in corporate goals</i>					
76. <i>Number of employees in corporate objectives</i>					
77. <i>Number of employees in corporate purposes</i>					
78. <i>Number of employees in corporate missions</i>					

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DIVISION/DEPT: PLANNING and CONSTRUCTION	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	<p><u>OBJECTIVE # 3 (CONT'D)</u></p> <p>INCREASE INDIVIDUAL STAFF EFFECTIVENESS, EFFICIENCY AND MOTIVATION.</p> <p>*****</p> <p>TASK # 3</p> <p>IMPROVE STAFF PROFESSIONAL GROWTH THROUGH THE IMPLEMENTATION OF AGENCY STRUCTURED AND SPONSORED TRAINING PROGRAMS</p> <p>Step #1</p> <p>Establish a career counseling program for employees interested in entering into other positions within the Agency</p> <p>Step #2</p> <p>Create an effective upward mobility program that will offer staff a clear opportunity to enter into other fields of employment within the Agency</p>																				





DIVISION/DEPT: PLANING and CONSTRUCTION	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	<p><u>OBJECTIVE # 3 (CONT'D)</u></p> <p>INCREASE INDIVIDUAL STAFF EFFECTIVENESS, EFFICIENCY AND MOTIVATION.</p> <p>*****</p>																				
	<p><u>TASK #4</u></p> <p>STREAMLINE OPERATIONAL PROCEDURES</p> <p>Step #1</p> <p>Reassess all existing procedures for the sake of simplification and efficiency</p> <p>Step #2</p> <p>Test newly developed procedures for their effectiveness before adopting them</p> <p>Step #3</p> <p>Develop incentive programs for Housing Authority employees which would motivate and inspire them to enjoy their work and do better</p>																				



DIVISION/DEPT: PLANNING and CONSTRUCTION	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																				
OBJECTIVE # 4																				
REVIEW AND IMPROVE THE PLANNING AND CONSTRUCTION DIVISION'S ORGANIZATIONAL STRUCTURE AND RESOURCES TO ENSURE EFFECTIVENESS AND EFFICIENCY *****																				
TASK 1																				
CREATE AN ACCESSIBLE DOCUMENT ARCHIVAL STORAGE SYSTEM FOR CONSTRUCTION DOCUMENTS AND RECORDS FOR DEPARTMENT FILES. MANY REHABILITATION EFFORTS MUST RELY ON "AS-BUILT" INFORMATION THAT HAD BEEN GATHERED AND STORED YEARS EARLIER. IF THIS INFORMATION IS NOT RETRIEVABLE, THE RESULTING DESIGNS MAY NOT BE COMPLETE OR ACCURATE.																				
Step #1																				
Create a space for document storage at 440 Turk Street																				
Step #2																				
Reorganize the Division's space at 666 Ellis Street for storage																				
Step #3																				
Relocate all documents and files left at Egbert Avenue to either Turk or Ellis Street. Bring all other division records from other locations to either of these areas																				



DIVISION/DEPT: PLANNING and CONSTRUCTION

OBJECTIVES/TASKS/SUBTASKS

Step #4

Develop a logical storage system in each of these areas, and put all documents in protected and accessible locations

YEAR 1

YEAR 2

YEAR 3

YEAR 4

YEAR 5

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1 2 3 4

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# DIVISION/DEPT: PLANNING and CONSTRUCTION

## OBJECTIVES/TASKS/SUBTASKS

### OBJECTIVE # 4

REVIEW AND IMPROVE THE PLANNING AND CONSTRUCTION DIVISION'S ORGANIZATIONAL STRUCTURE AND RESOURCES TO ENSURE EFFECTIVENESS AND EFFICIENCY \*\*\*\*\*

### TASK #3

DEVELOP AND IMPLEMENT AN AUTOMATED CONTRACT AND BUDGET MONITORING AND TRACKING SYSTEM SO THAT A CLEAR PICTURE OF COSTS AND DESIGN OR CONSTRUCTION PROGRESS CAN BE IMMEDIATELY AVAILABLE

### Step #1

Review the current P.C. based contract monitoring system and upgrade as necessary

### STEP #2

Explore the possibility of allowing the Planning and Construction Division to enter contracts in- to the Authority's financial system directly without relying on the existing Purchase Order system as administered by the Materials Management Department

### Step #3

Develop a P.C. based budget monitoring system to keep track of grant fund expenditures in an automated way

YEAR 1 YEAR 2 YEAR 3 YEAR 4 YEAR 5

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DIVISION/DEPT: PLANNING and CONSTRUCTION												
OBJECTIVES/TASKS/SUBTASKS												
<p>Step #4</p> <p>Explore ways to network these two systems within the Division so all key staff will have access to this information at their work station</p> <p>Step #5</p> <p>Explore the possibility of typing these systems into the Authority's "official" financial system, so that work will not be duplicated and so that the Planning and Construction Division will not be basing decisions on "unofficial" information</p>												

YEAR 1      YEAR 2      YEAR 3      YEAR 4      YEAR 5

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DIVISION/DEPT: PLANNING and CONSTRUCTION

OBJECTIVES/TASKS/SUBTASKS

OBJECTIVE # 5

REVIEW AND IMPROVE THE AUTHORITY'S HOUSING DEVELOPMENT AND REHABILITATION PROCESSES AND PROCEDURES.

\*\*\*\*\*

TASK #1

FORMALIZE THE CONSULTANT SELECTION PROCESS TO ENSURE THAT ARCHITECTS AND ENGINEERS RETAINED BY THE AUTHORITY ARE QUALIFIED TO COMPLETE THEIR CONTRACT OBLIGATIONS COMPETENTLY AND PROMPTLY

Step #1

Develop basic criteria on which all technical consultants will be selected. Allow flexibility to adjust the weighing of these criteria for the specific needs of each job

Step #2

Implement a consultant "report card" to provide documentation on the performance of consultants so that future consideration can be justified

YEAR 1

YEAR 2

YEAR 3

YEAR 4

YEAR 5

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	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
1. <i>Number of employees</i>					
2. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
3. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
4. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
5. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
6. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
7. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
8. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
9. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
10. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
11. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
12. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					
c. <i>Technical</i>					
d. <i>Skilled</i>					
e. <i>Semi-skilled</i>					
f. <i>Unskilled</i>					
13. <i>Number of employees in the following categories:</i>					
a. <i>Executive and administrative</i>					
b. <i>Professional</i>					

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[illegible]

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TASK #2

DEVELOP A PROCESS TO ENSURE THE APPROPRIATE PREPARATION OF THE "SCOPE OF WORKS" FOR EACH NEW DESIGN EFFORT, TO INCLUDE THE CONCERNS OF THE RESIDENTS, STAFF, THE NEIGHBORHOOD AND RESEARCH OF SIMILAR COMPLETED EFFORTS

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Step @1	Establish a checklist of appropriate sources of input for each design effort	-----0
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Step #2  
Establish a checklist of items to be physically inspected at a property scheduled for rehabilitation

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Step #3

Open up communications with other Housing Authorities to note successes they have realized on various types of design efforts

[illegible]



**DIVISION/DEPT: PLANNING and CONSTRUCTION**

## OBJECTIVES/TASKS/SUBTASKS

## Step #4

Formalize a process for getting staff and resident input on proposed design efforts

**YEAR 1**

YEAR 2

**YEAR 3**

## YEAR 4

**YEAR 5**

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1 2 3 4

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DIVISION/DEPT: PLANNING and CONSTRUCTION

OBJECTIVES/TASKS/SUBTASKS

OBJECTIVE # 5

REVIEW AND IMPROVE THE AUTHORITY'S HOUSING  
DEVELOPMENT AND REHABILITATION PROCESSES AND  
PROCEDURES.

\*\*\*\*\*

TASK #1

FORMALIZE THE CONSULTANT SELECTION PROCESS TO  
ENSURE THAT ARCHITECTS AND ENGINEERS RETAINED  
BY THE AUTHORITY ARE QUALIFIED TO COMPLETE THEIR  
CONTRACT OBLIGATIONS COMPETENTLY AND PROMPTLY

Step #1

Develop basic criteria on which all technical  
consultants will be selected. Allow flexibility  
to adjust the weighing of these criteria for  
the specific needs of each job

Step #2

Implement a consultant "report card" to provide  
documentation on the performance of consultants  
so that future consideration can be justified

YEAR 1

YEAR 2

YEAR 3

YEAR 4

YEAR 5

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DIVISION/DEPT: PLANNING and CONSTRUCTION	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	<p><u>OBJECTIVE # 5 (CONT'D)</u></p> <p>REVIEW AND IMPROVE THE AUTHORITY'S HOUSING DEVELOPMENT AND REHABILITATION PROCESSES AND PROCEDURES.</p> <p>*****</p> <p><u>TASK #2</u></p> <p>DEVELOP A PROCESS TO ENSURE THE APPROPRIATE PREPARATION OF THE "SCOPE OF WORKS" FOR EACH NEW DESIGN EFFORT, TO INCLUDE THE CONCERNS OF THE RESIDENTS, STAFF, THE NEIGHBORHOOD AND RESEARCH OF SIMILAR COMPLETED EFFORTS</p> <p>Step #1</p> <p>Establish a checklist of appropriate sources of input for each design effort</p> <p>Step #2</p> <p>Establish a checklist of items to be physically inspected at a property scheduled for rehabilitation</p> <p>Step #3</p> <p>Open up communications with other Housing Authorities to note successes they have realized on various types of design efforts</p>																				





	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
1. <i>Number of employees</i>					
2. <i>Number of employees who are</i>					
<i>a. White</i>					
<i>b. Black</i>					
<i>c. Hispanic</i>					
<i>d. Asian</i>					
<i>e. American Indian or Alaska Native</i>					
<i>f. Native Hawaiian or other Pacific Islander</i>					
3. <i>Number of employees who are</i>					
<i>a. Male</i>					
<i>b. Female</i>					
4. <i>Number of employees who are</i>					
<i>a. Married</i>					
<i>b. Single</i>					
<i>c. Divorced</i>					
<i>d. Widowed</i>					
5. <i>Number of employees who are</i>					
<i>a. U.S. born</i>					
<i>b. Foreign born</i>					
6. <i>Number of employees who are</i>					
<i>a. U.S. citizens</i>					
<i>b. Non-U.S. citizens</i>					
7. <i>Number of employees who are</i>					
<i>a. U.S. citizens and U.S. born</i>					
<i>b. U.S. citizens and foreign born</i>					
<i>c. Non-U.S. citizens and U.S. born</i>					
<i>d. Non-U.S. citizens and foreign born</i>					
8. <i>Number of employees who are</i>					
<i>a. U.S. citizens and U.S. born and married</i>					
<i>b. U.S. citizens and U.S. born and single</i>					
<i>c. U.S. citizens and U.S. born and divorced</i>					
<i>d. U.S. citizens and U.S. born and widowed</i>					
<i>e. U.S. citizens and foreign born and married</i>					
<i>f. U.S. citizens and foreign born and single</i>					
<i>g. U.S. citizens and foreign born and divorced</i>					
<i>h. U.S. citizens and foreign born and widowed</i>					
9. <i>Number of employees who are</i>					
<i>a. U.S. citizens and U.S. born and married and U.S. born</i>					
<i>b. U.S. citizens and U.S. born and married and foreign born</i>					
<i>c. U.S. citizens and U.S. born and single and U.S. born</i>					
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<i>h. U.S. citizens and U.S. born and widowed and foreign born</i>					
<i>i. U.S. citizens and foreign born and married and U.S. born</i>					
<i>j. U.S. citizens and foreign born and married and foreign born</i>					
<i>k. U.S. citizens and foreign born and single and U.S. born</i>					
<i>l. U.S. citizens and foreign born and single and foreign born</i>					
<i>m. U.S. citizens and foreign born and divorced and U.S. born</i>					
<i>n. U.S. citizens and foreign born and divorced and foreign born</i>					
<i>o. U.S. citizens and foreign born and widowed and U.S. born</i>					
<i>p. U.S. citizens and foreign born and widowed and foreign born</i>					
10. <i>Number of employees who are</i>					
<i>a. U.S. citizens and U.S. born and married and U.S. born and married</i>					
<i>b. U.S. citizens and U.S. born and married and U.S. born and single</i>					
<i>c. U.S. citizens and U.S. born and married and U.S. born and divorced</i>					
<i>d. U.S. citizens and U.S. born and married and U.S. born and widowed</i>					
<i>e. U.S. citizens and U.S. born and married and foreign born and married</i>					
<i>f. U.S. citizens and U.S. born and married and foreign born and single</i>					
<i>g. U.S. citizens and U.S. born and married and foreign born and divorced</i>					
<i>h. U.S. citizens and U.S. born and married and foreign born and widowed</i>					
<i>i. U.S. citizens and U.S. born and single and U.S. born and married</i>					
<i>j. U.S. citizens and U.S. born and single and U.S. born and single</i>					
<i>k. U.S. citizens and U.S. born and single and U.S. born and divorced</i>					
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<i>m. U.S. citizens and U.S. born and single and foreign born and married</i>					
<i>n. U.S. citizens and U.S. born and single and foreign born and single</i>					
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DIVISION/DEPT: PLANNING and CONSTRUCTION

OBJECTIVES/TASKS/SUBTASKS

Step #3

Update the comprehensive "Design Standards" document that notes the desired materials, methods of construction and planning approach to be followed when developing new complexes or rehabilitating existing projects

YEAR 1

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YEAR 2

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YEAR 3

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YEAR 4

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YEAR 5

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	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
1. <i>Revenue</i>					
2. <i>Cost of sales</i>					
3. <i>Gross profit</i>					
4. <i>Operating expenses</i>					
5. <i>Operating income</i>					
6. <i>Interest income</i>					
7. <i>Interest expense</i>					
8. <i>Income before taxes</i>					
9. <i>Taxes</i>					
10. <i>Net income</i>					
11. <i>Dividends</i>					
12. <i>Retained earnings</i>					

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DIVISION/DEPT: PLANNING and CONSTRUCTION	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																				
OBJECTIVE # 5																				
REVIEW AND IMPROVE THE AUTHORITY'S HOUSING DEVELOPMENT AND REHABILITATION PROCESSES AND PROCEDURES.																				
*****																				
TASK #6																				
REVIEW AND STREAMLINE THE EXISTING CONSTRUCTION ADMINISTRATION PROCESS, TO EXPEDITE CHANGE ORDERS AND MINIMIZE THE CHANCES OF FILING CLAIMS BY CONTRACTORS DUE TO DELAY																				
Step #1																				
Review and improve the Change Order process so that delays of construction activities can be avoided																				
Step #2																				
Explore the possibility of commission authorization to execute change orders within the approved budget without formal Commission action on each change order																				
Step #3																				
Review and improve the existing consultant and construction contract execution process to provide better coordination between Authority Divisions																				



DIVISION/DEPT: PLANNING and CONSTRUCTION	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	<p><u>OBJECTIVE # 6</u></p> <p>CREATE NEW HOUSING OPPORTUNITIES.</p> <p>*****</p> <p><u>TASK # 1</u></p> <p>SURVEY OUR EXISTING DEVELOPMENTS IN REGARDS TO UNDER-UTILIZED AREAS</p> <p>Step #1</p> <p>Evaluate the densities in our existing developments in relation to surrounding zoning conditions, and make studies to increase the unit densities when appropriate</p> <p>Step #2</p> <p>Open up a dialogue with the San Francisco Planning Department in regard to Urban Design considerations for our developments</p>																				



DIVISION/DEPT:	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4
<b>OBJECTIVES/TASKS/SUBTASKS</b>					
<b>OBJECTIVE # 6 (CONT'D)</b> <b>CREATE NEW HOUSING OPPORTUNITIES.</b> ***** <u>TASK # 2</u> SURVEY SAN FRANCISCO FOR POTENTIAL HOUSING OPPORTUNITY SITES/LOCATIONS Step #1 Check with all public agencies in San Francisco for surplus properties, such as the San Fran- cisco Unified School District, the City of San Francisco, the State Offices, the San Francisco Parking Authority, etc. Step #2 Contact private real-estate offices for avail- ability of land and or buildings which can be rehabilitated for housing					



DIVISION/DEPT: PLANNING and CONSTRUCTION

## OBJECTIVES/TASKS/SUBTASKS

OBJECTIVE # 6 (CONT'D)

**CREATE NEW HOUSING OPPORTUNITIES.**

[illegible]

### TASK #3

EXPLORE INNOVATIVE APPROACHES TO THE DEVELOPMENT OF NEW HOUSING

## Step #1

Analyze newly developed projects and check their applicability for San Francisco

## Step #2

Investigate innovative approaches for low-income housing developments, such as air-rights over parking lots, new uses for obsolete buildings, etc.









DIVISION/DEPT: PLANNING and CONSTRUCTION

OBJECTIVES/TASKS/SUBTASKS

Step #4

Determine the appropriate staffing requirements to efficiently monitor construction activities, and retain additional staff, if needed

YEAR 1

YEAR 2

YEAR 3

YEAR 4

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## **ADMINISTRATIVE SUPPORT**

This section of the plan includes objectives and tasks in the functional areas of Personnel Management, Materials Management and Management Information Systems. To the extent that we have clearly shifted the focus of the agency's energies to the field operation where it rightfully belongs, these support services, so unquestionably essential to efficient and effective field management, are a second level priority. They provide the manpower, materials, equipment and information necessary to the daily function of that operation.

## **PERSONNEL SERVICE**

Objective 1: Create and begin implementation of sound, measurable, classification-specific job standards for administrative classifications by August 30, 1990.

Objective 2: Create and implement sound, measurable, classification-specific job standards for craft classifications by November 30, 1990.

Objectives 1 and 2 are basically the same. They have been developed to ensure that every job classification created within the agency has a set of specific job performance standards. Such standards will be measurable and directly related to the duties and responsibilities performed within the classification. Logistically, we will start with performance standard



implementation for administrative classifications and then move to craft classifications. Employees will actively participate with management in the development of their classification's performance standards. Local unions will be informed of those new performance measures which have impact on those classifications they represent. Classification-specific performance measures will be integrated into the existing performance appraisal system. This will greatly strengthen the integrity of the performance appraisal process.

**Objective 3: Implement a revised classification structure for administrative and managerial employees by October 31, 1990.**

The Authority will be competitive in its administrative compensation structure. With the assistance of an external compensation consultant, the Authority will re-examine its existing compensation structure and benchmark job classifications based upon similar San Francisco Civil Service classifications and industry standards. The revised compensation structure will be fair and equitable and will be discussed with appropriate union locals before its implementation. In order to ensure for the ongoing implementation of a competitive compensation structure, the existing structure will be re-evaluated on a bi-annual basis.





Objective 4: Implement a San Francisco Housing Authority bonus compensation policy and program for administrative and managerial employees by October 1, 1990.

The Authority will take a more aggressive role in recognizing its employees for excellent performance. Thus, a bonus compensation program has been planned for implementation. The program will link compensation with performance. In the past, compensation has been tied to seniority and not to job performance. This type of program serves not only to recognize and reward those employees whose performance exceeds job standards, it will also provide an incentive for improvement for those employees whose job performance is less than excellent or where improvement is needed.

The program will also provide further compensatory possibility for employees who have reached to top of their classification salary schedules. The bonus compensation program will be incorporated with the Authority's existing performance appraisal system. A bonus salary schedule commensurate with above average performance levels will be developed. Re-evaluation of the bonus salary schedule will be conducted on a bi-annual basis.



**Objective 5: Provide guidelines to Authority divisions in the development of a comprehensive Authority operating policies and procedures manual by December 31, 1991.**

General intent is to develop a comprehensive Authority operating manual consolidating standard operating procedures in each division. Currently the Authority has no comprehensive manual which promulgates divisional operating policies and procedures. Rather, each division has its own procedures. The Authority has developed a comprehensive and well formatted Personnel Policies and Procedures Manual, which will be used as a model for creating the operations manual. Personnel Services will take the lead in assisting managers and supervisors on policy development and format. The manual will be distributed to appropriate management/supervisory personnel and will be updated on a regular basis. This manual will greatly improve the Authority in its effort to provide continuity and guide its workforce.

**Objective 6: Develop and implement an Authority affirmative action plan for the Personnel Services Division by June 30, 1992.**

General intent is to develop and implement an Authority employment affirmative action plan consistent with all required federal and state components and requirements. The plan will do more than just meet federal



guidelines. Its comprehensive approach will include developing a network of outside affirmative action and equal employment opportunity resources, linking union apprenticeship programs with Authority affirmative action plans and providing affirmative action/equal opportunity policy and procedure training to the Authority's supervisory staff. The program will be reviewed on a bi-annual basis to assure compliance and progressive minority employment opportunities.

**Objective 7: Develop a FY 1990-91 training schedule based on results from solicited training needs assessment by November 30, 1990.**

The general intent is to conduct an Authority-wide training needs assessment on all administrative and craft employees to determine a FY 1990-91 training schedule. Solicitation of staff on the areas which would strengthen their managerial development is imperative. In addition, annual performance appraisal ratings can be used to determine areas of workforce deficiency. Upon determining training needs areas, proper evaluation of available internal and external training programs/workshops will be completed, taking into consideration the quality of the program, cost and availability. A specific focus on personal productivity improvement, to include stress reduction training, will be explored in an effort to reduce escalating stress claim costs. In addition, the agency will continue to promote educational development opportunities through tuition reimbursement and profession certificate



programs.

**Objective 8: Develop and implement a loss control/safety program designed to manage and maintain loss control and safety practices, including educational and inspection activities by September 30, 1991.**

The general intent is to establish a comprehensive Authority Loss Control/Safety Program designed to reduce losses and to ensure a safe environment for its employees and residents. The program will be coordinated through a full-time loss Control/Safety Specialist. The specialist will be responsible for the establishment of an agency safety committee, and subsequently through its efforts the development of agency loss control and safety policies and procedures. In addition, the development and implementation of an inspection plan, emergency action plan, claims investigation plan and a safety training plan will be a part of the Loss Control/Safety program. The Authority will take a more active role in community safety and will establish memberships in various other safety organizations.

**Objective 9: Develop and implement a full service Authority managed PHA Bay Area Management and Technical Resources Training Center by May 31, 1990.**

It is the goal of the Personnel Services Division to see the Authority as a future leader in providing public housing management and technical training





resources for other Bay Area PHA's. Developing a full-service, Authority managed PHA Resource Training Center operating within our administrative facility would not only bring additional management and technical training to our own workforce, it would also generate profits to improve the Authority's fiscal stability. Basic certification courses required by HUD could be marketed and offered through our resource training center, in conjunction with the various housing organizations which administer them (NAHRO, WCPM, NAHM, etc.). In addition, basic and specialized management development training could be offered through a partnership with private industry training consortia. Such a plan would recognize the Authority as a leader in public housing management development and establish it as a credible resources training center for other PHA's.

Objective 10: Update the Authority's functional statement to represent current organizational structure by December 31, 1990.

The general intent is to update and revise format of the existing Authority functional statement to reflect current organizational structure and future development. Personnel Services, through a coordinated effort of all divisions will update the statement. Each division will develop a divisional statement and update and account for all new position classifications and title changes within their areas. Organizational charts representing Authority divisions, units and positions will also be updated. The new functional statement will



be reproduced, internally bound and distributed to all employees. A copy will be available to those residents or public who make request. It is anticipated that this document will provide a clearer understanding of the Authority's organizational structure for its employees, residents and public.

**Objective 11: Maintain effective employee relations through the implementation of sound benefits, incentives and employee assistance programs by December 31, 1991.**

The general intent is to provide Authority employees with competitive employment benefits, performance incentives and a sound employee assistance program. A review of current insurance plans to assure the most comprehensive employee benefit coverage within budgeted parameters will be completed. In addition, we will compare these plans to other public agency benefit programs to assure that we are competitive. It is also important that we enhance our employee assistant program offering additional confidential referral and assistance services in the areas of substance abuse, mental distress and emergency family services. Employee input is crucial in determining attitudes and opinions regarding Authority benefits, incentives and assistance programs. Therefore, employee opinion surveys will be developed and distributed to assess such attitudes. Upon determining what employees feel are substantial incentives, we will implement appropriate programs designed to reward employees for performance, tenure and other positive contributions.



Objective 12: Achieve Authority staffing needs through the implementation of sound recruitment, selection, orientation, placement/out placement and career development programs by December 31, 1991.

The general intent is to assure that the Authority is utilizing qualified resources to meet its staffing and placement needs, and selecting the best available applicants for job availabilities. The Personnel Services Division will continue to develop and establish a network of community, business and professional resources to attract qualified applicants. Specific trade journals, newspapers and professional organizations will be used in marketing available Authority job availabilities to the public. A system to track position vacancies, recalls and temporary staffing will be implemented in addition to a Resident Job Bank designed to identify qualified Authority resident applicants. The implementation of a more comprehensive employee orientation will be completed to assure dissemination of new hire information and to acquaint new employees with Authority mission, structure, staff, benefits, policies and procedures. The development of an Authority succession plan to promote upward mobility is also planned.



Objective 13: Review and assess existing personnel policies and procedures to determine current applicability and effectiveness; and develop and implement new or revised policy where appropriate by December 31, 1990.

The general intent is to ensure that agency personnel policies and procedures are current and effective, and to routinely review and implement new or revised policy when appropriate. It is mandatory that Authority policy is written and articulated to all employees. Dissemination of policy through use of a personnel policies and procedures manual, employee handbooks, MOU's and memoranda will be utilized. Revisions to these informational resources will be done on a regular basis and appropriate local unions will be notified of any new or revised policies. When appropriate, internal training workshops will be provided to inform managers and supervisors of new policies and procedures or any changes in existing ones.

Objective 14: Assure the adherence of Authority policy and procedures, compliance with active MOU's and enhancement of employer/employee relations through effective liaison with management, employees and unions by January 30, 1991.

The agency must assure adherence to policy and procedure and compliance with active MOU's by maintaining an effective liaison between management, employees and local unions. This will be done through effective counseling, training, hearings, meetings, conference sessions and negotiation forums.





OBJECTIVE 1: To create and begin implementation of sound, measurable classification/specific job standards for administrative classifications by May 30, 1990.

DIVISION/DEPT:	PERSONNEL SERVICES																				
		OBJECTIVES/TASKS/SUBTASKS																			
		PAGE 3:																			
		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
1.1	Update and revise existing administrative job descriptions.	X																			
1.2	Negotiate performance standards by division through facilitated performance standards meetings.	X																			
1.3	Assure that standards meet minimal acceptable industry standards.	X																			
1.4	Begin implementation of performance standards classifications not falling under Local 790.	X																			
1.5	Meet and confer with Local 790 regarding performance standards for those classifications which fall under their jurisdiction.					X															
1.6	Implement newly developed performance standards with existing performance appraisal system.									X											
1.7	Bi-annually revise classification performance standards.																		X		



OBJECTIVE 2: To create and implement sound, measurable classification/specific job standards for craft classifications by November 30, 1990.

DIVISION/DEPT:	PERSONNEL SERVICES	YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
OBJECTIVES/TASKS/SUBTASKS		X																								
TASKS:																										
2.1	Update and revise existing job descriptions of all craft personnel.																									
2.2	Negotiation of craft performance standards through facilitated performance standards meetings.						X	X	X																	
2.3	Assure that all craft performance standards meet minimal acceptable industry standards.						X	X	X																	
2.4	Meet and confer with all craft unions regarding performance standards for those classifications which fall under their jurisdiction.						X	X	X																	
2.5	Begin implementation of performance standards on all craft classifications.						X	X	X																	
2.6	Implement newly developed performance standards with existing performance appraisal system.									X																
2.7	Bi-annually revise classification performance standards.																			X						



**OBJECTIVE 3:** Implement a revised classification structure for administrative and managerial employees by October, 1991.

DIVISION/DEPT:	PERSONNEL SERVICES	YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
OBJECTIVES/TASKS/SUBTASKS																										
TASKS:																										
3.1	Restructure existing compensation structure.																									
3.2	Revise classification structure to reflect appropriate benchmark based on industry standards.																									
3.3	Meet and confer with Local 790 to agree upon recommended classification proposal.																									
3.4	Approve resolution for new classification structure by Commission.																									
3.5	Implement new classification structure with related policies and procedures.																									
3.6	Reexamine every two (2) years for further restructure.																									



**OBJECTIVE 4:** To implement San Francisco Housing Authority Bonus Compensation Policy and Program for administrative and managerial employees by October 01, 1992.

DIVISION/DEPT:	PERSONNEL SERVICES																				
		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS TASKS:																					
4.1	Verification of available funds by Finance.																				
4.2	Create a sound bonus compensation program based upon revised classifications and new performance standards.																				
4.3	Meet and confer with Local 790 to present proposed bonus compensation classification salary schedule.																				
4.4	Obtain approval of new bonus compensation salary schedule from Commission.																				
4.5	Implement bonus compensation schedule and incorporate with existing performance appraisal system.																				
4.6	Bi-yearly revision of bonus compensation schedule.																				





**OBJECTIVE 5:** To provide guidelines to Authority divisions in the development of a comprehensive agency operating Policies and Procedures Manual by December 30, 1991.

DIVISION/DEPT:	PERSONNEL SERVICES	YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		1					2					3					4					1				
		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
OBJECTIVES/TASKS/SUBTASKS																										
TASKS:																										
5.1	Collect and consolidate existing policies and procedures being used in each division.																									
5.2	Instruct on formatting, using Personnel Policies and Procedures as a model.									X	X															
5.3	Assist supervisors and managers in the development of new policies and procedures and/or changes to existing ones.									X	X															
5.4	Obtain approval from Commission on new operating Policies and Procedures Manual.											X														
5.5	Distribution of completed operations manual to appropriate management/supervisory personnel.											X														
5.6	Bi-annually update operations manual.																									X



OBJECTIVE 6: To develop and implement an agency Affirmative Action plan for Personnel Services by June 30, 1992.

DIVISION/DEPT: PERSONNEL SERVICES	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
		TASKS:																			
6.1	Hire an Affirmative Action Consultant to assist in developing an appropriate Affirmative Action Plan.																				
6.2	Develop an appropriate Affirmative Action schedule with required components based upon Consultant's recommendations.																				
6.3	Obtain approval of Affirmative Action plan from Personnel Committee.																				
6.4	Link union apprenticeship programs with Affirmative Action employment program.																				
6.5	Develop a network of outside Affirmative Action and Equal Employment Opportunity resources.																				
6.6	Implement Affirmative Action program.																				
6.7	Provide training to all supervisory personnel regarding their responsibilities for adherence to Affirmative Action/Equal Employment Opportunity policies and procedures.																				
6.8	Review of Affirmative Action program bi-yearly to assure employment compliance.																				



OBJECTIVE 7: To develop a FY 1990-91 training schedule based on results from solicited training needs assessment by November 30, 1990.

DIVISION/DEPT: PERSONNEL SERVICES		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASKS:		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
7.1	Develop agency training needs assessment.	X																			
7.2	Conduct training needs assessment on both administrative, management and craft personnel.	X																			
7.3	Develop training plan based upon results from solicited training needs assessment.	X																			
7.4	Evaluate and access outside training services.					X															
7.5	Provide managerial/supervisory training opportunities through internal and external workshops/seminars.					X															
7.6	Provide personnel workshops (i.e., stress reduction and personnel productivity workshops).					X															
7.7	Provide educational development opportunities through tuition reimbursement and professional certificate programs.					X															



**OBJECTIVE 8:** Develop and implement a Loss Control/ Safety Program designed to manage and maintain loss control and safety practices, including educational and inspectional activities by September 30, 1991.

DIVISION/DEPT: PERSONNEL SERVICES		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASKS:		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
8.1	Establish a Loss Control/Safety Specialist position and appoint incumbent.	X																			
8.2	Develop and implement agency Loss Control and safety policies and procedures.	X																			
8.3	Establish agency Safety Committee and membership in Bay Area Safety organizations.	X																			
8.4	Develop a formal periodic safety self inspection plan to include safety evaluation procedures.			X																	
8.5	Develop and implement an agency emergency action plan.			X																	
8.6	Develop and implement a claims investigation plan.			X																	
8.7	Implement a safety training and educational plan for employees and residents.			X																	
8.8	Develop and implement an agency Loss Control maintenance program designed to assess effectiveness of existing safety programs, policies and procedures.														X						





OBJECTIVE 9: Develop and implement a full service Authority managed PHA Bay Area Management and Technical Resources Training Center by May 31, 1991.

DIVISION/DEPT:	PERSONNEL SERVICES	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS TASKS:																					
9.1	Develop Bay Area Public Housing training needs assessment and distribute.																				
9.2	Plan projected two-year training schedule based on results of assessment.																				
9.3	Establish a training site.																				
9.4	Order, acquire necessary training materials.																				
9.5	Offer industry standards training courses in basic areas of Housing Management/Maintenance Operations.																				
9.6	Offer training courses in supervisory training.																				
9.7	Develop PHM Certification and Training Opportunities and market through NAHRO, WCFM, etc.																				
9.8	Hire contract trainer(s) for variety of planned curriculum.																				



OBJECTIVE 10: To update Agency's Functional Statement to represent current organizational structure by December 31, 1990.

DIVISION/DEPT: PERSONNEL SERVICES		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
10.1	Coordinate the Development of Divisional Statements.	X																			
10.2	Update and account for all new position classifications and title changes.	X																			
10.3	Update and create agency organizational charts by division, unit, and position.	X																			
10.4	Print copies for all employees.	X																			
10.5	Bind in-house and distribute.	X																			



**OBJECTIVE 11:** To maintain effective employee relations through the implementation of sound benefits, incentives, and employee assistance programs by December 31, 1991.

DIVISION/DEPT:	PERSONNEL SERVICES	YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
OBJECTIVES/TASKS/SUBTASKS																										
TASKS:																										
11.1	Review current insurance plans and carriers to assure for comprehensive employee coverage, cost effectiveness, responsive service, and agency competitiveness.																									
11.2	Develop employee opinion surveys to assess attitudes relating to benefits, incentives, and assistance programs.																									
11.3	Upon analysis of employee survey, establish and implement Incentive Programs designed to reward employees for performance, tenure, agency enhancements through suggestions, and other positive contributions.																									
11.4	Implement a Bonus Compensation plan, linking compensation to performance. (See Objective 3)																									
11.5	Establish and implement Employee Assistance Programs designed to offer confidential referral and assistance in the areas of substance abuse, mental distresses, and emergency family services.																									



OBJECTIVE 12: To achieve agency staffing needs through the implementation of sound recruitment, selection, orientation, placement/outplacement, and career development programs by December 31, 1991.

DIVISION/DEPT: PERSONNEL SERVICES		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
12.1	Develop and establish a network of community, business, and professional resources to attract qualified applicants.	X																			
12.2	Develop job ads and position announcements and market in specific trade journals, newspaper, and professional organizations.				X																
12.3	Develop a Resident Job Bank designed to identify qualified resident applicants and recalls.				X																
12.4	Develop and implement a system designed to track position vacancies, recalls, and temporary staffing.								X												
12.5	Personnel Services will take responsibility for the initial screening of qualified applicants, to include interviewing, testing, and referral to hiring Manager.	X																			
12.6	Develop Employee Orientation Checklist to assure complete dissemination of new hire information.																				
12.7	Conduct scheduled orientations to acquaint employees with SFHA mission, structure, staff, benefits, and policies and practices.				X																
12.8	Develop a succession plan to promote career development, upward mobility, and personal development.																X				
12.9	Coordinate an employee outplacement service to assist in outplacement due to workforce reduction.																	X			





**OBJECTIVE 13:** To review and assess existing personnel policies and procedures to determine current applicability and effectiveness; and develop and implement new or revised policy where appropriate by December 31, 1990.

DIVISION/DEPT:	PERSONNEL SERVICES																				
		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS	13.1 Personnel Specialists will review those policies and procedures applicable to their areas of expertise.	X																			
	13.2 Upon review Specialists will develop and revise new policies and procedures where applicable, based upon labor standards, and industry trends and practices.	X																			
	13.3 Organizational Development Specialist will consolidate and format new and/or revised policies and procedures.				X																
	13.4 New or revised policies to be reviewed by Personnel Services Director and approved by Executive Director.				X																
	13.5 Revise and update Employee Handbook to reflect policy and procedure changes.				X																
	13.6 Meet and confer with Local 790 on all new and revised policies and procedures.				X																
	13.7 Print new and revised policies and procedures, Employee Handbook and distribute to manager/supervisors.				X																
	13.8 Review new and revised policies with managers/supervisors.																	X			



**OBJECTIVE 14:** To assure the adherence of Agency policy and procedures, and compliance with active MOU's and enhancement of employer/employee Relations through effective liaison with management, employees, and unions, by January 30, 1991.

DIVISION/DEPT:	PERSONNEL SERVICES															
		YEAR 1					YEAR 2					YEAR 3				
		1	2	3	4		1	2	3	4		1	2	3	4	YEAR 5
OBJECTIVES/TASKS/SUBTASKS TASKS:		X														
1.1	Communicate agency policy and contract compliance through effective counselling, training, hearings, meet and confer sessions, and negotiation forums.															
1.2	Develop and implement ongoing Employee Relations workshops designed to inform Managers about applicable laws, policies and practices governing employment.					X										
1.3	Develop an Automated System designed to track employee turnover, grievance matters, absenteeism, unemployment and Worker's Compensation claims to improve efficiency of Personnel Services management.									X						
1.4	Adhere to, and maintain exit interview policy to assure for smooth transitions, and to obtain feedback on employment environment.					X										



## **MATERIALS MANAGEMENT**

### **Objective 1: Streamlining Operations**

Materials Management must find ways to share some of its extensive and varied responsibilities in order to provide the best possible services to the Authority. In conjunction with this effort, the recycling program should be reorganized using resident involvement and should be established for all recyclable materials produced by this Authority. These materials may include paper, aluminum cans, building materials and other recyclable metals, plastics, etc.. The funds generated from such a program can be used to enhance resident services or used in some other fashion that benefits residents of public housing.

Materials Management is in complete agreement with the ongoing efforts to bring services in closer contact with the resident population and provide local management staff greater authority in managing their properties. To facilitate this endeavor, Materials Management proposes that hazardous waste monitors and photocopier key operators are identified at each property office where such services are required. This would reduce down time on the photocopier machines at each office and increase the ability of the Authority to keep its developments free of hazardous wastes. Storage needs for and controls on materials and supplies is another important consideration. Decentralization



requires increased controls, as well as, additional storage facilities and related equipment. Materials Management has recognized this need and has requested assistance in this area through CIAP funding during the next fiscal year.

#### Objective 2: Standardize Materials.

In order to maximize efficiency and minimize the size of storage facilities in the decentralized maintenance program, material standardization must be promoted whenever possible. Materials Management suggests that this can be accomplished through an assessment of the material and supply needs for each development, establishment of mechanisms to approve all items prior to becoming inventory stock as a result of new construction or extensive modernization, and creation of materials standards and specifications for all inventory items. All these tasks should be coordinated and managed by a Quality Control Committee representing the various craft and administrative functions.

#### Objective 3: Fleet Inventory.

One primary goal of management decentralization is the ability to respond quickly to service needs. It is imperative that the Authority maintain its vehicle fleet in prime operating condition to meet this goal. The Commission





recognized this important aspect of the Authority's operation and approved a vehicle replacement schedule in 1987 to address the deteriorating condition of the fleet. Materials Management recognizes that replacement of fleet vehicles in an ongoing process and continues to identify those vehicles in need of replacement. Additionally, vehicle maintenance and care, driver accountability and safety and monitoring the use and vehicular needs assessment of the Authority are equally important functions in maintaining an adequate and operational vehicle fleet. Toward this end, Materials Management is aggressively pursuing stricter guidelines for use of Authority vehicles, access to the vehicles, and in placing responsibility for maintaining the vehicles with each employee authorized to drive them.

#### Objective 4: Update Computer System.

Materials Management uses the System 38 for the procurement function, and in some cases, the development of contract documents. The Plexus system is utilized for some contract documents and word processing functions. Additionally, a PC system is used for input of inventory receipts and issues, and for inventory counts. None of these systems interact with one another, thereby eliminating the ability to transfer documents or data other than by manual input. Clearly, a fully functional and integrated computer system must be developed in order to allow Materials Management to function efficiently and effectively. To assist in such an endeavor, Materials Management has



provided clear guidelines related to its functional requirements and is prepared to analyze any new system's capability to perform necessary tasks. Materials Management must also continue to monitor the data input into the present systems to ensure that it is accurate, and thereby, acceptable for transfer into another system.

**Objective 4: Update Computer System.**

Materials Management must be able to provide data on affirmative action goals and statistical information related to the successful attainment of such goals. In designing the new computer system, Materials Management has requested that vendor information include all necessary data related to identifying groups targeted by the Authority's Affirmative Action Policy, as well as, the Federal government's directives related to documenting affirmative action achievements.

**Objective 5: Affirmative Action.**

Materials Management recognizes the need to provide business opportunities for the many diverse communities in San Francisco. In addition to evaluating potential contractors based on work experience, qualifications and cost estimates, the Authority also examines ownership and work force composition as part of the criteria for selection. All contracts and bids are advertised in



the City and County of San Francisco MBE/WBE Purchasing Directory to avail qualified minority and women business enterprises of contract opportunities. Materials Management has worked with the City and County of San Francisco in developing a Minority and Women Business Enterprise Availability Study in order to identify specific areas of underachievement related to business opportunities for these groups. The Authority is also scheduled to host a workshop on bid and contract procedures for women-owned businesses on August 8, 1990.



DIVISION/DEPT: MATERIALS MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE I	: TO EXPAND THE WAREHOUSE STORAGE CAPACITY AND STREAMLINE OPERATIONS IN ORDER TO PROVIDE A FULL COMPLEMENT OF SERVICES IN A PROMPT AND COST EFFECTIVE MANNER. =====																				
TASK A	: Identify key operators for photocopy machines at each location, and provide training for them on the routine maintenance of the photocopiers.																				
SUB-TASKS	1) Key operators.																				
TASK B	: Assign Maintenance Operations staff the role of hazardous waste monitor. Identify sites that produce hazardous wastes and establish site monitors.																				
TASK C	: Identify site coordinators for paper recycling. Establish aggressive recycling program to include other recyclable items.																				
	1) Recycling coordinators.																				





**DIVISION/DEPT: MATERIALS MANAGEMENT**

OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK D : Hire Materials Management ----- distribution specialist to handle office supply storeroom and related duties, finalize office supply stock items and requisitioning procedures.				X																
1) All office supplies identified and stored in storeroom.				X																
TASK E : Identify and secure additional storage space at 1815 Egbert to include salvaging of obsolete stock items and preparing other additional space for inventory items.								X												
1) Required storage space ----- secured.								X												



DIVISION/DEPT:		MATERIALS MANAGEMENT																			
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE II	: STANDARDIZE MATERIALS USED THROUGH- OUT THE AUTHORITY'S DEVELOPMENTS, INCLUDING NEW CONSTRUCTION. =====																				X
TASK A	: Identify and dispose of obsolete inventory items.																				X
SUB-TASKS	: 1) Identification of obsolete inventory items.								X												
	2) Disposal of obsolete inventory items.								X												
TASK B	: Assess need for, and indentify possible substitution parts and materials for slow moving and sole source items.																				X
	1) Identification of sole source stock items.																				X
TASK C	: Establish mechanism to review and approve all items that will become inventory stock as a result of new construction or extensive moderniza- tion projects.																				X



DIVISION/DEPT:		MATERIAL MANAGEMENT																			
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK D	<p>1) In coordination with Planning &amp; Construction and Maintenance Operation, potential stock items to be used in new construction or major rehabilitation or modernization projects will be reviewed prior to acceptance as construction material.</p> <p>: In coordination with the Quality Control Committee and craft forepersons, set material standards and specifications for all inventory items.</p> <p>1) Written specification of inventory items for quality control.</p>																				
TASK E	<p>: Establish the Quality Control Committee as the forum to evaluate all recommended materials for use in Authority properties.</p> <p>1) Percentage of materials reviewed by Quality Control Committee.</p>																				
TASK F	<p>: Track usage patterns to assist in establishing standard quantities for issue purposes.</p>																				



DIVISION/DEPT: MATERIALS MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK G	1) Number of inventory items tracked for usage purposes.																X				
	: Systemic elimination of storeroom issue requisitions for all craft related work.																				
	1) Percentage of issues to craft using work orders.																				
TASK H	: Establish a system of random spot counts by management personnel for all items inventoried in the warehouse.																				
	1) Number of inventory items spot counted.																				
TASK I	: Establish random truck stock inventory counts.																				
	1) Number of truck stocks inventoried.																				





DIVISION/DEPT: MATERIALS MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE III	: TO MAINTAIN A FLEET INVENTORY OF VEHICLES THAT ARE NOT OLDER THAN SIX YEARS =====																				
TASK A	: Establish and distribute policy manual on motor pool vehicle use and authorized drivers.																				X
SUB-TASKS	: 1) Comprehensive policy manual																				
TASK B	: Establish tracking system for monitoring and controlling vehicle assignment																				
SUB-TASKS	: 1) Vehicles tracked through use of sign-in and sign-out logs.																				
TASK C	: Establish driver safety training courses in cooperation with the Authority's insurer and identify individuals required to participate in such training																				
SUB-TASKS	: 1) Eligible drivers enrolled in and completing driver safety training program.																				



DIVISION/DEPT: MATERIALS MANAGEMENT

OBJECTIVES/TASKS/SUBTASKS

YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4

TASK D : Perform needs assessment for vehicle replacement, and develop and implement vehicle replacement, and develop and implement vehicle replacement schedule.

SUB-TASKS : 1) Inventory and determine condition of vehicles currently in fleet.

TASK E : Develop measureable system to record abuses or negligence on the part of employees in the operation or care of fleet vehicles and define disciplinary action.

SUB-TASKS : 1) Develop system to obtain driving records of all employees or potential employees.

TASK F : Develop vehicle maintenance program and establish schedule for implementation

SUB-TASKS : 1) Vehicles serviced under preventive maintenance program.



DIVISION/DEPT: MATERIALS MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK G	: Develop program for the disposal or sale of fleet vehicles that are no longer being used.																				
SUB-TASKS	: 1) Sale or auction of vehicles no longer used.																				



DIVISION/DEPT: MATERIALS MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE IV	: TO ASSIST IN THE DEVELOPMENT OF AN UPDATED COMPUTER SYSTEM THAT IS MORE FUNCTIONAL, ACCOMMODATES OPERATIONAL, AS WELL AS, INFORMATIONAL NEEDS OF THE MATERIALS MANAGEMENT UNIT. =====																				
TASK A	: Develop guidelines and definitive requirements related to the Procurement function.																				
SUB-TASKS	: 1) Written guidelines and requirements for procurement.																				
TASK B	: Develop guidelines and definitive requirements related to the inventory control function.																				
SUB-TASKS	: 1) Written guidelines and requirements for Inventory control.																				
TASK C	: Develop guidelines and definitive requirements related to the Contract Management function.																				
SUB-TASKS	: 1) Written guidelines and requirements for Contract Management.																				





DIVISION/DEPT: MATERIALS MANAGEMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK D	: Revise reorder points to reflect current usage and required lead times.	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
SUB-TASKS	: 1) Reorder points for all stock items revised.	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
TASK E	: Revise stock numbers to reflect a uniform and systematic numbering approach.	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
SUB-TASKS	: 1) Revision of stock numbering system for all inventory items.	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---



## MANAGEMENT INFORMATION SYSTEMS

Objective 1: Provide the Authority with a new integrated MIS system.

Decentralization is going to be a key item in increasing the efficiency of the Authority. The new system will support these operations, track costs to a lower level and provide staff with statistical information demonstrating the effectiveness of the program. Reports will be developed to reveal areas of deficiencies or areas of achievements.

Complementing management training will be computer system training. After learning and understanding the Authority's mission, can staff better appreciate and utilize the machine as a tool and facilitator in their job. The dual training of staff will help them to be more productive and able to complete more work in less time.

When addressing the fiscal stability of this Authority, a new computer system capable of accurately tracking costs and providing accountability will give staff the tools to make informed decisions. The new system will give staff the chance to accurately analyze the Authority's current financial position and to forecast future needs.



Modernization and capital development projects will be greatly supported by a functioning integrated MIS system. Past and anticipated future costs will be tracked and projected giving staff the ability to plan future actions based on sound data.

Making a decision to eliminate the proposed contractor's system and processing full speed on the user committees to define operational needs will help the agency proceed to the next step. The enhancing of the existing system or exploring alternative system in the marketplace can begin. Only after the conclusion of that search can an informed decision be made to carry the Authority's information needs into the new decade.

This Authority has a responsibility to help the residents that reside in its developments. The targeting of these services toward residents is dependent upon accurate demographic information to be effective. The new computer system will provide this demographic information, giving these services a better chance of helping the intended group.

With the computer system which records and tracks minority, women and local based business can we monitor our progress toward affirmative action. This would benefit groups that have been traditionally under-represented in the contracts and employment of the Authority.



DIVISION/DEPT: Administration & Finance Information Systems	OBJECTIVES/TASKS/SUBTASKS #1 - Assure agency & staff are making the best use of existing technology	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
		X																			
A	Develop Executive Steering Committee to develop long term strategies and goals	X																			
	1 Designate a representative group of individuals from each Department	X																			
B	Review each system with Departmental representatives																				
	1 Evaluate efficacy of those systems					X															
	2 Examine possible changes or improvements					X															
	3 Issue written report						X														
C	Better utilize existing equipment in interim																				
	1 Work with Departments to train staff on their systems					X															
	2 Develop written procedural manuals in conjunction with Department managers					X															
D	Provide general orientation to managers and supervisors on computer concepts and terms	X																			
E	Act as internal reference source of local	X																			





DIVISION/DEPT: Administration & Finance Information Systems	OBJECTIVES/TASKS/SUBTASKS #1 - Assure agency & staff are making the best use of existing technology	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	training centers																				
	F Internally review the systems for better technical utilization																				
	1 Identify and list areas for improvement					X															
	2 Create work schedule for correction					X															
	3 Implement action plan								X												



Administration and Finance DIVISION/DEPT: New MIS system development project		YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
OBJECTIVES/TASKS/SUBTASKS #1 Provide agency with a new integrated MIS system		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
A. Evaluate current systems and make written recommendations as to the viability of those systems				X																						
B. Organize MIS steering committee			X																							
C. Organize user committees			X																							
D. Develop system specifications for the new MIS system based on the output of the above steering and users committees					X																					
E. Evaluate current and potential systems against developed system specifications and make recommendations about those systems								X																		
F. Install/develop new MIS system									X	ongoing																
3. Maintain newly installed developed MIS system.										X	ongoing															



## FINANCIAL MANAGEMENT

Objective 1: Establish sound accounting procedures, system of internal control and recordkeeping.

As the Authority is close to removing itself from the "financially troubled" classification, we must move toward an accounting system where such an occurrence will not happen again. This will involve looking at the present duties of each staff and how they relate to the accounting structure. Once deficiencies have been identified and corrected, they will be documented in the form of accounting manuals and available to employees to follow. In addition, Finance Division will review the audit findings and implement recommended corrective measures. The budget process and reporting will be examined to determine areas that may need changes. Each department will be kept well-informed on the different expense items in their budget and advised on how to reduce and control expenditures.

Objective 2: Report of financial condition in a timely manner.

Once the financial system is in place, Finance Division will be able to provide reports to management for review on a regular basis. These reports will help management in making decisions that affect their operation. There will be a schedule of reports that will be provided by the appropriate staff. This will



ensure that outside reports to HUD will be submitted in a timely fashion and internal reports to management will be distributed on a regular basis.

Objective 3: Improve revenue enhancement, control of expenditures and budget forecasting.

Finance Division has noted the situation involving the funding of housing authorities steadily worsening. As HUD is expected to require all housing authorities to require all housing authorities to be at the 97% occupancy level, funding from operating subsidies will gradually decrease. The Authority will have to improve its rent collections process. The Finance Division will look into ways of presently investing our non-committed income. We will maximize our investments through accurate cashflow projections of all expenses. Other possible sources of revenue will encompass ways of analyzing the ways to utilize full availability of funding sources from all programs (Low-Rent, Section 8, CDBG, CIAP, etc.). This division recommends strategies of raising funds from private sector and public agencies to finance the resident organizations and resident activity programs. Apply for Section 8 funding for new programs. This will allow us to allocate higher percentages of administrative expenses to Section 8 and absorb some of Low-Rent overhead expenses. We must be able to fix or rehab more units by instituting tighter control of expenditures. The Council of Large Public Housing Authority (CLPHA) has been instrumental in initiating legislation in helping housing





authorities with additional funding. We need to solicit and lobby for additional funding from local, state and federal agencies.

**Objective 4: Implementing project-base-budgeting.**

The Finance Division plays a significant role in implementing the decentralization program of the Authority. Decentralization will result in a more effective and efficient means of delivering services. The Finance Division will design an accounting structure that will meet the needs of those changes. We will also identify the cost centers to track and setup the account codes accordingly. This will provide us with the framework to base budget by projects thereby enabling us to modify the budget of various cost centers to accommodate the Authority's priorities for the upcoming fiscal year. A project based budgeting system will require at least three years to fully implement and test. The Finance Division will then be able to monitor at a project level the revenue that has been collected and the expenses incurred for each project. Reports will be developed to reveal areas of deficiencies and/or achievements.

**Objective 5: Institute training for all staff in accounting procedures.**

**Objective 6: Provide accurate and informative payroll data and related reports.**

**Objective 7: Develop a centralized file management program.**



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE I	: ESTABLISH SOUND ACCOUNTING PROCEDURES, SYSTEM OF INTERNAL CONTROL AND RECORDKEEPING =====																				
TASK A	: Revise existing Accounting procedures and control in each area of the Finance Division.																				
SUB-TASKS	: 1) Review and/or examine the internal processing and the segregation of duties. ----- 2) Evaluate the strength and weaknesses of the present system. ----- 3) Implement the revise procedures. -----									X											
TASK B	: Review and Revise the following Accounting Manuals: 1) Accounts Payable ----- 2) Section 8 Accounting ----- 3) Utility Billing ----- 4) Payroll ----- 5) Stoves and Refrigerators -----																				



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK B continued	: 6) Tenant Accounting -----																				
	: 7) Cash Receipts -----																				
	: 8) Journal Entries -----																				
	: 9) General Ledger -----																				
	: 10) Force Account -----																				
TASK C Review Auditor's findings and implement recommendations.																					
SUB-TASKS	: 1) Assess the status of each finding. -----																				
	: 2) Develop workplan for each finding. -----																				
	: 3) Assign the responsibility for closing. -----																				
	: 4) Close the findings. -----																				
TASK D	: Regular analysis and control of the general ledger accounts.																				
SUB-TASKS	: 1) Determine the scope of duties. -----																				



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUB-TASKS continued	: 2) Assign responsibility for analysis and control. -----X																				
	3) Implement monthly closing schedules of general ledger and schedule of submission of financial reports. -----X																				
TASK E	: Establish regular update and monitoring of fixed assets ledger.																				
SUB-TASKS	: 1) Complete fixed assets ledger. -----X																				
	2) Establish policy and procedures on fixed assets accounting. -----X																				
	3) Train appropriate personnel. -----X																				
	4) Implement procedures. -----X																				
TASK F	: Establish efficient inventory control system to accurately monitor inventory operations.																				
SUB-TASKS	: 1) Evaluate present inventory system. -----X																				





DIVISION/DEPT: FINANCE DIVISION		YEAR 1					YEAR 2					YEAR 3					YEAR 4					YEAR 5				
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4		1	2	3	4	
SUB-TASKS	:																									
	2) Ascertain areas requiring improvement.																									
	3) Develop procedures.																									
	4) Close coordination with Materials Management, staff in implementing these enhancements.																									
TASK G	:																									
SUB-TASKS	:																									
	1) Identify duties and responsibilities for auditing.																									
	2) Define level of authority.																									
	3) Initiate necessary paper work to recruit the personnel.																									
	4) Hire personnel.																									
	5) Internal Auditor to develop workplan.																									
	6) Implement Interim Audit function.																									



## OBJECTIVES/TASKS/SUBTASKS

Page 5



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE III	: IMPROVE REVENUE ENHANCEMENT CONTROL OF EXPENDITURES AND BUDGET FORECASTING =====																				
TASK A	: Develop a target investment income program.																				
SUB-TASKS	: 1) Establish management authority and responsibilities. -----X																				
	2) Review banking system. -----X																				
	3) Establish cash management reporting system:																				
	a) Prepare cash position report -----X																				
	b) Prepare cash flow projection -----X																				
	c) Prepare investment records and reports -----X																				
	4) Develop investment strategies to maximize return of investment.																				
	a) Identify various investments -----X																				
TASK B	: Explore energy saving opportunities.																				



DIVISION/DEPT: FINANCE DIVISION																					
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUB-TASKS	: 1) Review HUD Utility regulations and schedule.																				
TASK C	: Pursue appeal of performance funding system level.																				
TASK D	: Solicit and lobby for more local, state and federal funding.																				
TASK E	: Establish tighter budget control of expenditures.																				
SUB-TASKS	: 1) Distribute approved budget to departments.																				
TASK F	: Develop accurate forecasting system.																				
SUB-TASKS	: 1) Training																				
	: 2) Solicit from departments their activity program for the upcoming years.																				
	: 3) Derive budget requirements, utilizing historical data.																				
	: 4) Preparing the budget.																				





DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUB-TASKS continued	: 3) Monitor budget on a regular basis to ensure availability of funds and adjust as warranted.																				
	4) Develop forecasting reports.																				



DIVISION/DEPT: FINANCE DIVISION

OBJECTIVES/TASKS/SUBTASKS

YEAR 1 YEAR 2 YEAR 3 YEAR 4 YEAR 5  
1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4

OBJECTIVE IV : IMPLEMENT PROJECT BASE BUDGETING  
=====

TASK A : Design accounting structure to accommodate changes in the organizational structure.

SUB-TASKS : 1) Meet with the Executive Director and divisional heads to determine cost centers. -----X

2) Set-up account codes for these cost centers. -----X

3) Distribute codes to staff for review and comments. -----X

4) Finalize account system. -----X

5) Train the staff on the system. -----X

TASK B : Prepare budgets by project.

SUB-TASKS : 1) Provide staff with historical data to assist in formulating a realistic budget. -----X

2) Consolidate information from project for review. -----X



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUB-TASKS continued	: 3) Determine availability of funds for each project.												X								
	4) Modify budgets to accommodate program priorities and funding sources.												X								
	5) Finalize budget package:																				
	a) Present budget to Finance Committee for review and approval.												X								
	b) Submit budget to full board for approval.												X								
TASK C	c) Submit budget to HUD for approval.												X								
	: Execute Project Base System.																				
	SUB-TASKS : 1) Establish testing period and modify as necessary.																	X			
TASK D	2) Finalize and execute the the system.																			X	
	: Monitor income expenditures by project.																				



DIVISION/DEPT: FINANCE DIVISION																					
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUB-TASKS	: 1) Create reports to capture data by project cost center.																				
	2) Distribute reports to departments for review and budget compliance.																				





DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE V	: INSTITUTE TRAINING FOR ALL STAFF IN ACCOUNTING PROCEDURES =====																				
TASK A	: Analyze employees training needs.																				
SUB-TASKS	: 1) Conduct survey of duties and staff capabilities.																				
	2) Develop assessment of training needs.																				
TASK B	: Develop outside training program.																				
SUB-TASKS	: 1) Identify training programs.																				
	2) Prioritize needs.																				
	3) Offer training in accounting seminars instituted by professionals.																				
	4) Offer opportunities to attend formal courses at institutions of higher learning for upward mobility.																				
TASK C	: Develop in-house training program.																				



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
SUB-TASKS	: 1) Familiarize the finance staff with all unit functions.																				
	2) Educate staff of their respective functions.																				
	3) Implement cross-training for staff that interacts with similar classifications.																				
TASK D	: Establish a Finance Accounting Library.																				
SUB-TASKS	: 1) Review available literature.																				
	2) Purchase Accounting Books.																				
	3) Subscribe to various accounting publications.																				



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE VI	: TO PROVIDE ACCURATE AND INFORMATIVE PAYROLL DATA AND RELATED REPORTS =====																				
TASK A	: Reorganize and systematically arrange existing files and documents in the payroll department. -----x																				
TASK B	: Review and evaluate reports and documents produced from the present Bank of America Payroll System. -----x																				
TASK C	: Solicit payroll requirements from other divisions and determine any changes in payroll reports and enhancements needed in the system.																				
SUB-TASKS	: 1) Meet with various departments to determine their requirements from the payroll system. -----x 2) Consolidate all payroll requirements and changes for review. -----x 3) Coordinate with Management Information System in making these revisions in the system. -----x																				



DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
TASK D	: Develop the flexibility of preparing non-standard reports from the payroll data base. -----x																				
TASK E	: Interface payroll system into the general ledger system. -----x																				
TASK F	: Analyze and report on the advantages of changing to a weekly payroll as compared to the present bi-weekly payroll. -----x																				
TASK G	: Improve communication and update operational procedures between Finance and Personnel Services Division. -----x																				
TASK H	: Assess the workload in the payroll department to determine any need for an additional staff. -----x																				





DIVISION/DEPT: FINANCE DIVISION		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVE VII	: TO DEVELOP A CENTRALIZED FILE MANAGEMENT PROGRAM =====																				
TASK A	: Review existing recordkeeping system.																				
SUB-TASKS	: 1) Inventory by description and location current file. -----X																				
	: 2) Inventory by description and location stored files. -----X																				
TASK B	: Design record management system.																				
SUB-TASKS	: 1) Determine staff need. -----x																				
	: 2) Develop system for filing and retrieving current documents. -----x																				
	: 3) Determine system for storing non-current information. -----x																				
	: 4) Develop written procedures. -----x																				
TASK C	: Determine staffing requirements for implementation. -----X																				
TASK D	: Hire and train staff. -----X																				
TASK E	: Implement system. -----X																				



## LEGAL SERVICES

Objective 1: Revise lease and grievance procedures consistent with HUD's due process determination and/or revise policies and procedures for evictions related to drug and criminal activity.

This objective ties into Issue No. 1 (Management Initiatives) of the Executive Director's Agenda for the 1990's. It also ties somewhat into Issue No. 7 (Drug Elimination). The Authority's lease and grievance rules need to be revised to assure compliance with legal requirements and to provide for the legal remedy of eviction for residents who are involved in criminal and illegal activity. The policy must then be strengthened by sound enforcement practices and procedures.

This objective ultimately ties into the Authority's fiscal stability (Issue No. 4). Strengthening the lease and grievance policies and procedures will ultimately improve rent collections as well as reduce need for time consuming and costly evictions.

Objective 2: Reduce time frames and increase number of actions processed.

This objective of the Legal Department ties into the management initiative and fiscal stability issues and work tasks from the Executive Director's agenda.



Decreasing time frames to process eviction actions, grievances and claims will ultimately reduce time delays and decrease the amount of revenue that is lost while actions are pending.

**Objective 3: Reduce number of claims and insurance dollars spent.**

This objective of the Legal Department combines management initiative, fiscal stability, and modernization and capital development. The primary task required to meet this objective is the Safety Officer position. The Authority needs to focus on safety/risk management in the 1990's in order to reduce its overall cost and to maintain fiscal stability. The Authority must also develop a preventive maintenance program and better resident maintenance response procedures to reduce its resident maintenance claims and losses. This objective also requires the development and implementation of better claims management procedures. It is anticipated that many modernization and capital development improvements will be required to meet this objective as well.

**Objective 4: Reorganize and add more staff to make operations more timely and efficient.**

This objective of the Legal Department also ties into the management initiative and fiscal stability. Most of this objective has already been realized. The vacant Assistant Attorney position for evictions and landlord/tenant

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matters has been filled. The addition of this position has greatly enhanced the department's ability to respond to evictions and related matters. The newly created second Assistant Attorney position for contracts has also been filled. This staff person is already taking a leading role in resolving and addressing many of the Authority's construction and contract related problems. The goal of the new staff is to ultimately decrease the Authority's litigation cost and litigation losses.

Objective 5: Develop more streamlined and efficient process for handling resident grievances.

This objective ties into the management initiative and drug elimination issues. One of the goals for the 90's will be to eliminate drug related and criminal activity related evictions from the grievance process entirely. Another goal will be to increase the use of the grievance procedure to resolve management/resident related issues in lieu of having these issues resolved at Commission meetings. The grievance procedure should be enhanced as the residents' tool to resolve landlord/tenant disputes with management. Better training of managers, better procedures and more involvement of residents in the community as neutral panel members will be necessary.





Objective 6: Review policies and procedures regarding Authority fleet.

This objective also ties into management initiatives and fiscal stability. The Authority does not have any collision insurance on its fleet vehicles and must pay any physical damages to the vehicles out of its operating budget. Reducing losses in this area is therefore critical. The objective would require the Authority to focus on accident reduction and safety, formalize a vehicle policy and establish a regular maintenance program for its vehicles.

Objective 7: Establish an Authority-wide safety policy.

As discussed in Objective 3, the Authority needs to focus on safety and risk management in the 1990's. Ultimately the Authority's ability to obtain insurance and the cost of insurance will be affected by whether or not the Authority has safety policies and procedures. This objective of the Legal Department therefore has broad fiscal stability impact and is a management initiative. It may require the development of such things as emergency escape routes, emergency disaster plans, driver training, guidelines regarding use of electrical outlets and appliances, fire safety and other items related to safety in the work place and safety for our residents.

## CHAPTER IV

The first of the two main divisions of the subject is the history of the English language. This is a branch of knowledge which has of late years attracted much of the public attention, and has become one of the most popular of the sciences. It is a science which is of great importance to the student of literature, and to the student of history. It is a science which is of great importance to the student of literature, and to the student of history.

THE SECOND DIVISION OF THE SUBJECT IS THE HISTORY OF THE ENGLISH LITERATURE.

The second of the two main divisions of the subject is the history of the English literature. This is a branch of knowledge which has of late years attracted much of the public attention, and has become one of the most popular of the sciences. It is a science which is of great importance to the student of literature, and to the student of history. It is a science which is of great importance to the student of literature, and to the student of history.

Objective 8: Provide more effective and efficient legal services while reducing dependency on outside counsel for litigation and other matters.

Ultimately this is both a management initiative as well as a fiscal stability requirement. This objective, if realized, would reduce Authority cost for litigation and make existing operations more efficient. Part of the objective also ties into management information in that a very important part of the objective is the establishment and enforcement of a record retention policy for the Authority as well as computer systems which would allow better tracking and handling of claims, litigation, evictions and grievances.



DIVISION/DEPT:	LEGAL DEPARTMENT				YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
					1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4

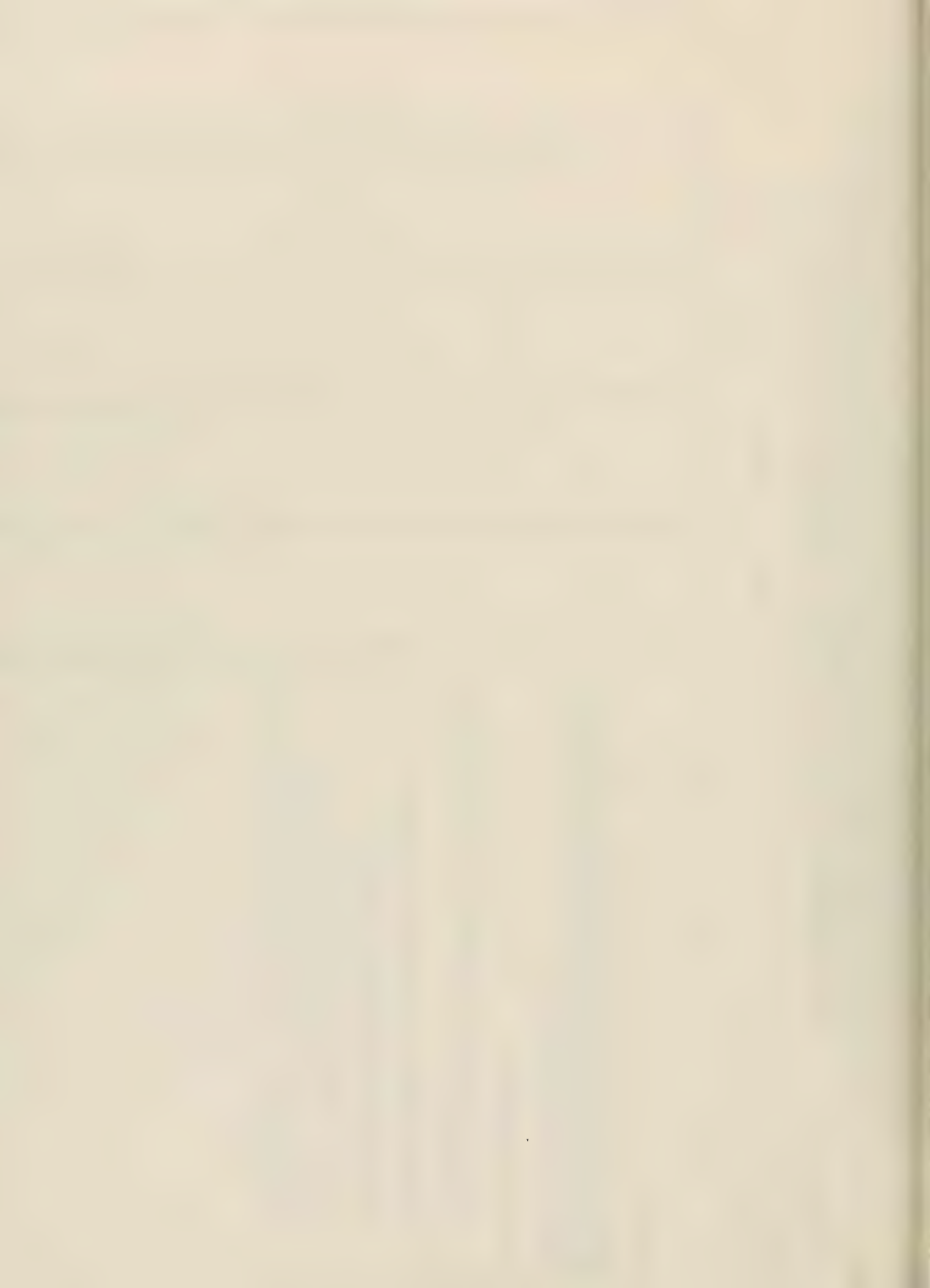
OBJECTIVES/TASKS/SUBTASKS																								
					1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4

OBJECTIVE

REVISE LEASE/GRIEVANCE PROCEDURE CONSISTENT WITH HUD'S DUE PROCESS DETERMINATION AND/OR REVISE POLICIES AND PROCEDURES FOR EVICTIONS RELATED TO DRUG AND CRIMINAL ACTIVITY.

Tasks and Sub-Tasks:

1. Review housing management policies and procedures.
2. Review lease and grievance procedure.
3. Create lease procedures manual.
4. Revise eviction procedures and manual.
5. Improve rent collections and reduce need for evictions.









DIVISION/DEPT:	LEGAL DEPARTMENT																				
OBJECTIVES/TASKS/SUBTASKS		<u>YEAR 1</u>				<u>YEAR 2</u>				<u>YEAR 3</u>				<u>YEAR 4</u>				<u>YEAR 5</u>			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
(i) Need to rethink policy and revise policy to reduce number of stipulations or to start the process earlier.																					
(ii) Rethink and revise escrow policy to reduce time delays involved in posting payments.																					
6. Consider changing 3-day notice to indicate tenant should turn in keys if quit (some tenants move after notice and without better follow up from property manager this isn't immediately discovered).																					
7. Pursue eviction after violation of stipulation within 10 working days of default.																					
8. Prepare and file notice to tenant within 10 working days																					
9. Prepare, file and post Writ within 5 working days after judgment																					
10. Clarify bankruptcy procedures.																					
11. Consider collection techniques.																					
12. Implement computer system that will adequately track eviction processing.																					



DIVISION/DEPT:      LEGAL DEPARTMENT		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<p><u>OBJECTIVE</u></p> <p>REDUCE NUMBER OF CLAIMS/INSURANCE DOLLARS SPENT.</p> <p>Tasks and Sub-Tasks:</p> <ol style="list-style-type: none"> <li>1. Clarify who is responsible for procuring insurance.</li> <li>2. Review/revise procedures.</li> <li>3. Determine current processing timeframe and reduce timeframe by 10% each year.</li> <li>4. Involve property manager in receiving/verifying tenant claims before submitting to Legal. Instruct managers that:               <ol style="list-style-type: none"> <li>a. Copy of claim should be kept in tenant file.</li> <li>b. Claim form should be submitted to Legal promptly.</li> <li>c. Legal will acknowledge receipt of claim within 2 weeks.</li> </ol> </li> <li>4. Recommend that maintenance related claims should be informally resolved.               <ol style="list-style-type: none"> <li>a. Establish better cooperation and coordination between maintenance and property management.</li> </ol> </li> </ol>																					



DIVISION/DEPT:	LEGAL DEPARTMENT																				
OBJECTIVES/TASKS/SUBTASKS		YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
b. Look at maintenance priorities and develop policy on repairs SFHA will make (floods; soaked draperies, etc.)																					
d. Establish timeframe such that habit-ability issues will be repaired within 5 working days and other matters will be fixed within 15 working days.																					
5. Look at system that allows deducting tenant delinquent balances from claim proceeds.																					
6. Focus on safety/risk management to prevent claims.																					
a. Create and fill Safety Officer position.																					
b. Establish and implement Safety Policy																					









DIVISION/DEPT:	LEGAL DEPARTMENT	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																					
OBJECTIVE																					
DEVELOP A MORE STREAMLINED AND EFFICIENT PROCESS FOR HANDLING TENANT GRIEVANCES																					
Tasks and Sub-Tasks:																					
1. Clarify procedures and managers role:																					
(a) Confirm-policy and train managers to resolve grievances informally without need for hearings and without creating delinquent balances. This will require giving managers more discretion and powers to resolve landlord/tenant issues.																					
(b) Consider hearing officer instead of panel																					
2. Require manager to send complete grievance package (complaint, lease agreement, document supporting action, manager answer, request for hearing) to the Legal Department at the same time and not in parts.																					
3. Prepare a routing form to facilitate process and better notification to managers.																					
4. Update list of neutral panel members																					
5. Identify person to investigate and pull																					



DIVISION/DEPT:	LEGAL DEPARTMENT	OBJECTIVES/TASKS/SUBTASKS	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
			1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
		together cases for management (new paralegal position) and to act as management advocate (property manager and/or attorney or paralegal) to present Authority's side at hearing.																				
		6. Change lease to be more stringent regarding drugs.																				
		7. Establish policy to resolve issue with tenant who falls behind in rent while pursuing a grievance.																				
		(a) Change grievance procedure to mandate escrow payment of rent pending grievance.																				
		8. Complete Grievance Process within 45 days or eliminate entirely for drug related or criminal activity evictions.																				
		9. Implement computer system that will adequately track claims processing.																				

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DIVISION/DEPT:	LEGAL DEPARTMENT	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
OBJECTIVES/TASKS/SUBTASKS		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<u>OBJECTIVE</u>																					
REVIEW POLICY AND PROCEDURES REGARDING AUTHORITY FLEET																					
Tasks and Sub-Tasks:																					
1. Focus on accident reduction/safety:																					
a. Provide driver training to employees who drive SFHA vehicles.																					
b. Limit number of accidents employees can be involved in and still retain driving privileges.																					
c. Formalize vehicle policy.																					
d. Establish regular maintenance program/inspections of vehicles.																					
e. Establish and enforce mandatory reporting time and procedures for reporting accidents.																					
f. Update and revise reporting forms																					
g. Check out driver license status before hiring employees required to drive as part of job; periodic review of status for all employees																					

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DIVISION/DEPT:	LEGAL DEPARTMENT	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																					
h. Reaffirm policy regarding paying for parking tickets with proof of payment sent to Legal; perhaps automatic reduction from pay checks if not paid timely.																					
i. Establish incentive programs to reward good driving																					









DIVISION/DEPT:	LEGAL DEPARTMENT	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																					
<u>OBJECTIVE:</u> PROVIDE MORE EFFECTIVE AND EFFICIENT LEGAL SERVICES WHILE REDUCING DEPENDENCY ON OUTSIDE COUNSEL FOR LITIGATION MATTERS.  Tasks and Sub-Tasks:  1. Hire more staff: attorney, paralegal, clerk.  2. Create better record keeping systems Authority wide. a. Establish record retention policy b. Implement microfilming program c. staff training  3. Reduce causes of litigation a. Establish and enforce policies and procedures for all divisions. b. Identify problem areas. c. Propose solutions.  4. Develop computer systems for better tracking and handling of claims and litigation.																					

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DIVISION/DEPT:	LEGAL DEPARTMENT	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5			
		1				1				1				1				1			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
OBJECTIVES/TASKS/SUBTASKS																					
<u>OBJECTIVE:</u> PROVIDE MORE EFFECTIVE AND EFFICIENT LEGAL SERVICES WHILE REDUCING DEPENDENCY ON OUTSIDE COUNSEL FOR LITIGATION AND OTHER MATTERS.																					
Tasks and Sub-Tasks:																					
1. Hire more staff: attorney, paralegal, clerk.																					
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a. Establish record retention policy																					
b. Implement microfilming program																					
c. staff training																					
3. Reduce causes of litigation																					
a. Establish and enforce policies and procedures for all divisions.																					
b. Identify problem areas.																					
c. Propose solutions.																					
4. Develop computer systems for better tracking and handling of claims and litigation.																					
a. Obtain personal computer for paralegal and legal secretary.																					







